AcquiLine *PRweb* v2.3

Functional User's Guide

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Preface: Introduction to *PRweb*

The AcquiLine suite of products, developed by American Management Systems (AMS), is targeted at achieving paper-free business processes. AcquiLine is a web-based product suite that is a "bolt-on" to the Standard Procurement System (SPS) program's Procurement Desktop-Defense (PD^2) system. The AcquiLine *PRweb* module is a direct paperless channel between the requesting agent and a Contracting Office's PD^2 database. With the *PRweb* module, the requesting agent can create Purchase Requests, with attachments, for supplies and services directly from a desktop web browser. After creating a Purchase Request, the *PRweb* user can route it to other *PRweb* users in the organization for additional information, changes, funding commitment, and package approval, all according to locally defined business practices. Once the Purchase Request is approved, the information is saved directly to the PD^2 database at the Contracting Office. Procurement officials can then utilize the full power of PD^2 to fulfill the requirement as submitted, or can route the requirement back to the *PRweb* user if further clarification is needed.

The *PRweb* module also allows customers to view PR status information through their desktop web browser. This capability saves the requesting agent and Contracting Office valuable time, providing customer self-service rather than necessitating a phone call or e-mail status inquiry to the Contracting Office.

The *PRweb Functional User's Guide* is designed to be a comprehensive manual providing detailed procedures for the various system features of the product. The effective use of this manual is to ensure successful use of *PRweb*. The manual is divided into twelve sections: Getting Started, *PRweb* Desktop, Account Maintenance, Purchase Request, PR Modifications, Line Item, Attachments, DD254, Workflow, Reports, Transfer Document and Help.

Chapter 1: Getting Started

The *PRweb* desktop allows the requesting agent to successfully perform procurement-related tasks. A requesting agent in *PRweb* has the capability of creating, viewing, editing, routing and approving PRs from the *PRweb* desktop. Maintenance of the *PRweb* user account allows the user to access *PRweb*, become familiar with desktop functionality and set user preferences.

In This Chapter…

Using the functions described in this chapter you can:

- Register for access to *PRweb*
- Log onto PRweb

Accessing *PRweb*

A valid user account is required to access *PRweb*. To obtain an account, the registrant must complete the registration form, which then needs to be approved by the designated System Administrator. Alternatively, a user account can be created directly by the System Administrator. Upon completion of either of these two options, the user can log on to the *PRweb* module. The login process requires the registrant to successfully enter a username and password. Upon successful log on, the user has access to the *PRweb* desktop and can participate in the requirements phase of the procurement process.

Information Tab

The **Login** window opens to the *Information* tab. The *Information* tab provides a location in which the System Administrator can post information or messages for *PRweb* users to see. It is recommended that the user read the *Information* tab upon login.

Figure 1: Login – Information Tab

Login Tab

PRweb users can access the *PRweb* module via the **Login** window.

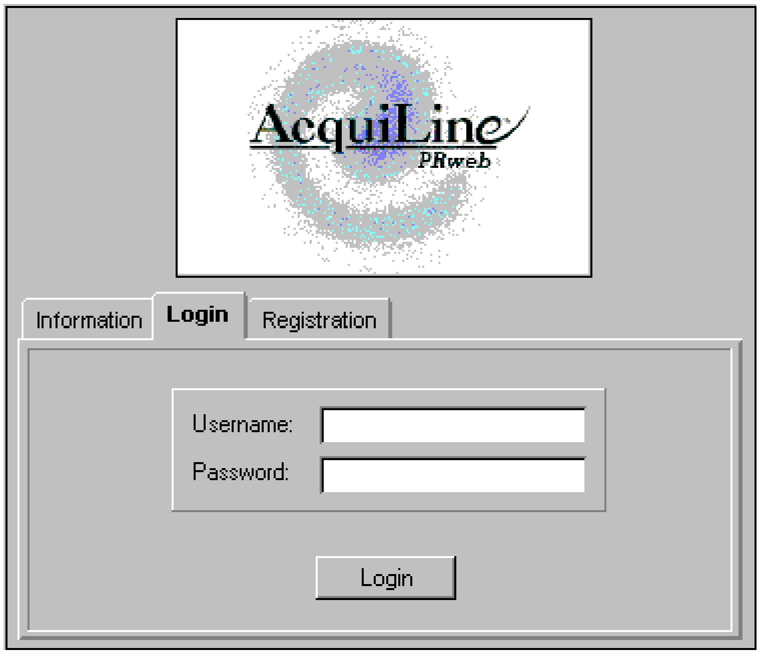

Figure 2: Login – Login Tab

To log on to the *PRweb* module:

1. Click the *Login* tab from the **Login** window.

2. Enter the username in the **Username** field.

3. Enter the corresponding password in the **Password** field.

Note: The password entered must be a minimum of 8 characters including one or more special characters (e.g., "%" or "#").

4. Click the [**Login**] button.

Registration Tab

The *Registration* tab is the location in which a person begins the registration process to become a *PRweb* user.

To register as a *PRweb* user:

1. Select the *Registration* tab from the **Login** window.

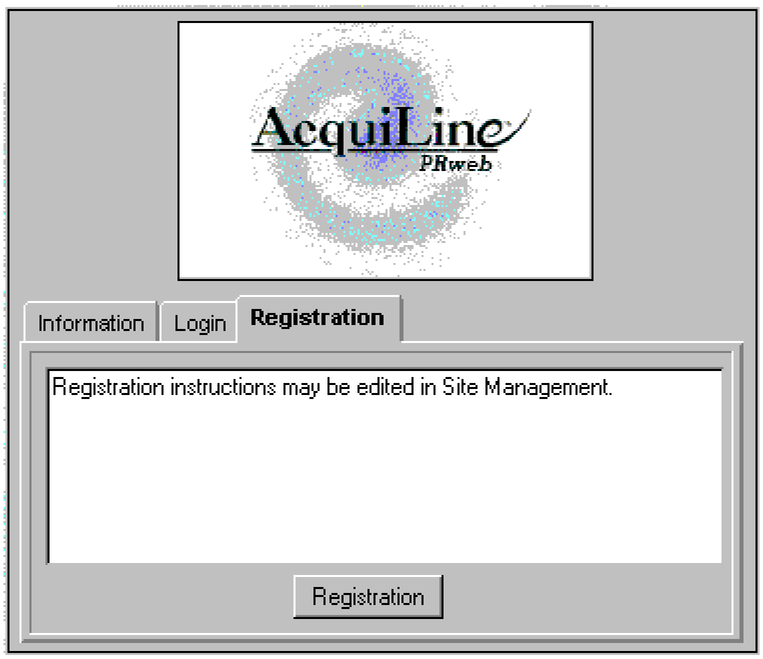

Figure 3: Login – Registration Tab

2. Click the [**Registration**] button.

   *The **Registration Form** window opens with the User tab displayed.*

User Tab

Figure 4: Registration Form – User Tab

1. Enter a username in the **Username** field.

Note: All username information is account specific. No two users may have the same username.

---

2. Enter a password in the **Password** field.

Note: The password entered must be a minimum of 8 characters including one or more special characters (e.g., "%" or "#").

---

3. Verify the password by re-entering it in the **Verify** field.

4. If applicable, select the **Administrator** check box.

Note: The **View PRweb PRs in Status Report** check box and **View All PRs in Status Report** check box are disabled if the **Administrator** check box is selected.

---

5. If applicable, select the **View PRweb PRs in Status Report** check box.

   Selecting the **View PRweb PRs in Status Report** check box requests the right to use the **PR Status Report** function to view PRs that have been created in *PRweb* and reside in PD^2. For more information on **PR Status Report**, refer to the "PR Status Report" section in *Chapter 10: Reports*.

6. If applicable, select the **View All PRs in Status Report** check box.

   Selecting the **View All PRs in Status Report** check box requests the right to use the **PR Status Report** function to view all PRs that reside in PD^2 including PRs created in *PRweb*. For more information on **PR Status Report**, refer to the "PR Status Report" section in *Chapter 10: Reports*.

Contact Tab

1. Click the *Contact* tab.

   The information contained on the *Contact* tab provides a profile for the user account. The contact information includes **Contact Name**, **Title, Phone** number, **Fax** number, **E-mail** address and a **Requesting Office** address. If contact information needs to be changed or updated after registration, contact the *PRweb* System Administrator.

Figure 5: Registration Form – Contact Tab

Note: Select the **Check here if you are an existing Contact in PD^2…** check box to choose an existing contact in PD^2. This activates the [**Select**] and [**Remove**] buttons. Clicking the [**Select**] button allows the registrant to search for existing contact information contained in PD^2. Clicking the [**Remove**] button erases any contact information previously pulled from PD^2. If an existing contact is selected, the fields on the *Contact* tab populate with the information pertaining to that contact.

---

2. Enter a name in the **Contact Name** field.

   This is a required field. The contact name displays in the user list when creating route templates, routing sheets and groups.

3. Enter the contact's title in the **Title** field.

4. Enter the contact's phone number in the **Phone** field.

5. Enter the contact's fax number in the **Fax** field.

6. Enter the contact's e-mail address in the **E-mail** field.

   This is a required field.

7. Click the [**Select**] button to select a Requesting Office.

   The Requesting Office Contact Search window opens.

Note: The **Requesting Office** field on the PR defaults to the Requesting Office selected by the contact during the registration process. The registrant can search for an existing contact or add a new one.

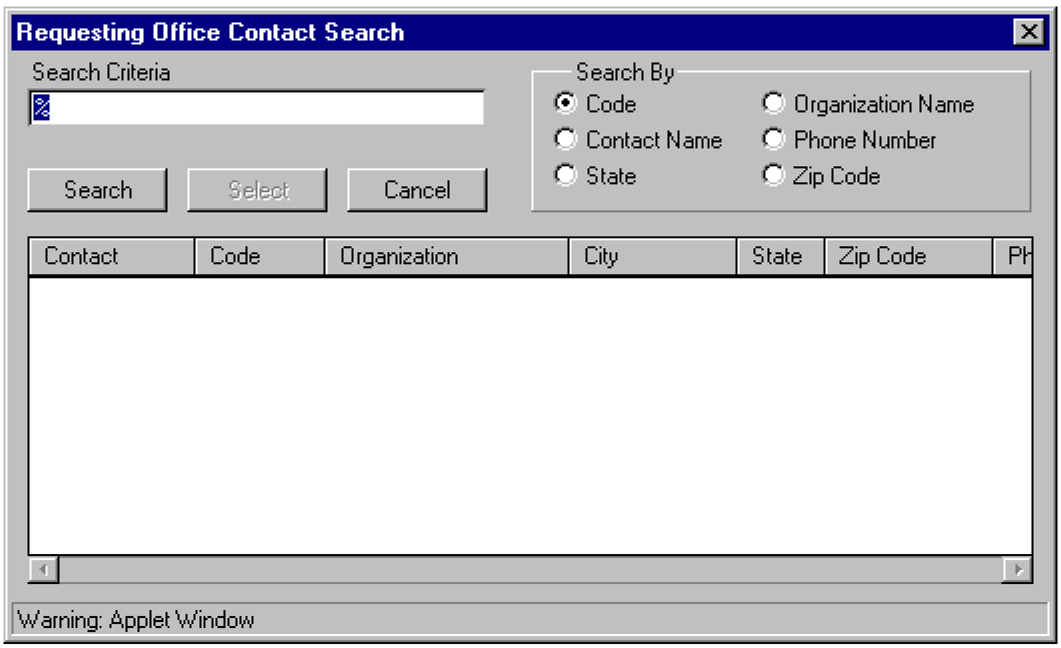

Figure 6: Requesting Office Contact Search Window

8. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information on searches, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

9. Highlight the desired Requesting Office and click the [**Select**] button.

   The Contact *tab displays with the selected Requesting Office in the* ***Requesting Office*** *field.*

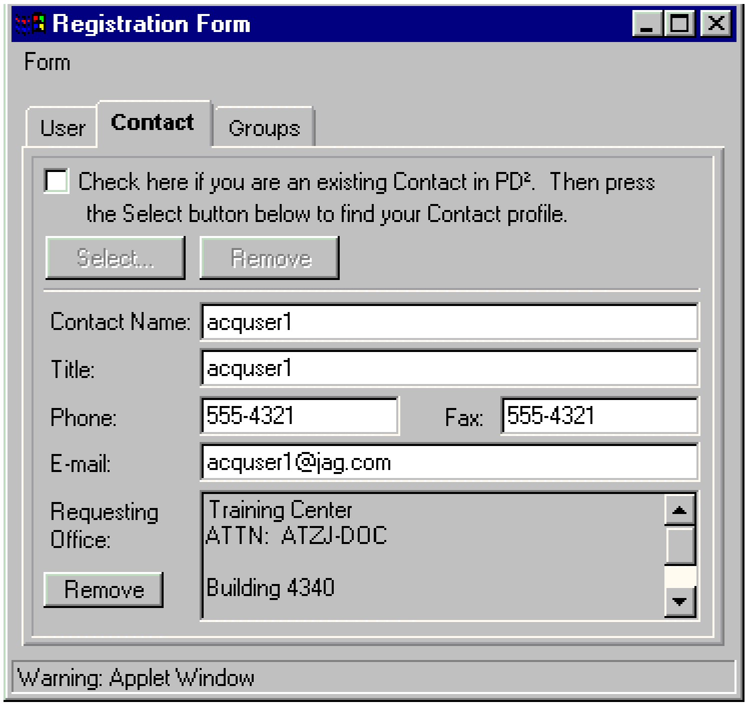

Figure 7: Registration Form – Contact Tab

Groups Tab

1. Click the *Groups* tab.

The *PRweb* module utilizes groups to organize users with commonalties and helps to organize the approval trail. There are two tabs within the *Groups* tab, the *Member* tab and *Manager* tab. The *Member* tab allows the registrant to request membership of a group and the *Manager* tab allows the registrant to request to be a manager of a group.

Member Tab

The *Member* tab allows a registrant to request membership of a group. The PRweb routing components allows the user to route PRs to groups of users. For more information on routing, refer to the "Routing" section in *Chapter 9: Workflow*.

Figure 8: Registration Form - Groups Tab - Member Tab

1. Click the [**Add**] button to search for a group.

   *The **Group Search** window opens.*

Note: It is not required that a registrant be a member of a group.

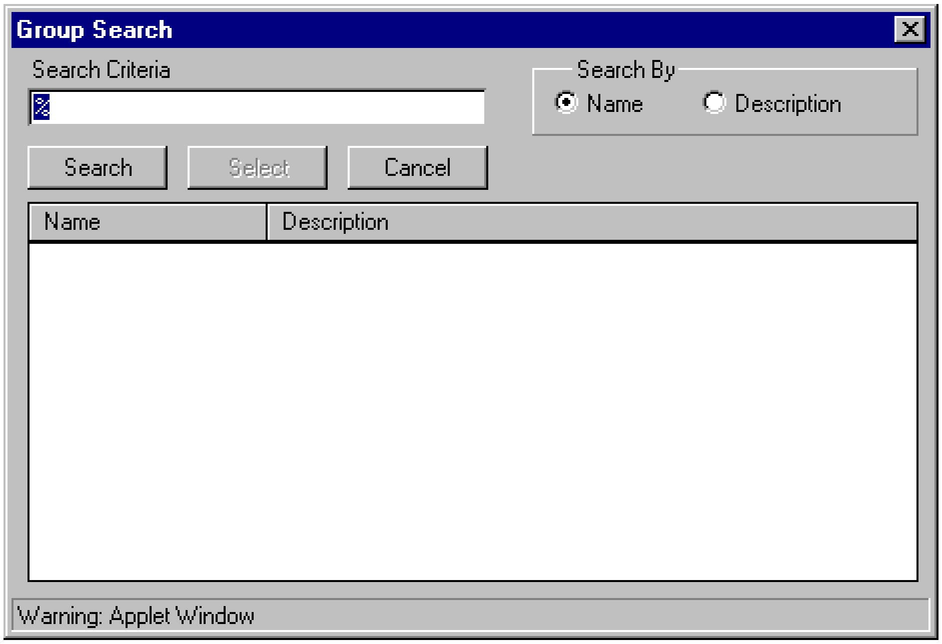

Figure 9: Group Search Window

2. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information regarding searches, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

3. Highlight the desired group(s) and click the [**Select**] button.

   The Member *tab displays with the selected group(s).*

Note: Multiple groups can be selected by pressing the <**Ctrl**> key and clicking on the desired groups.

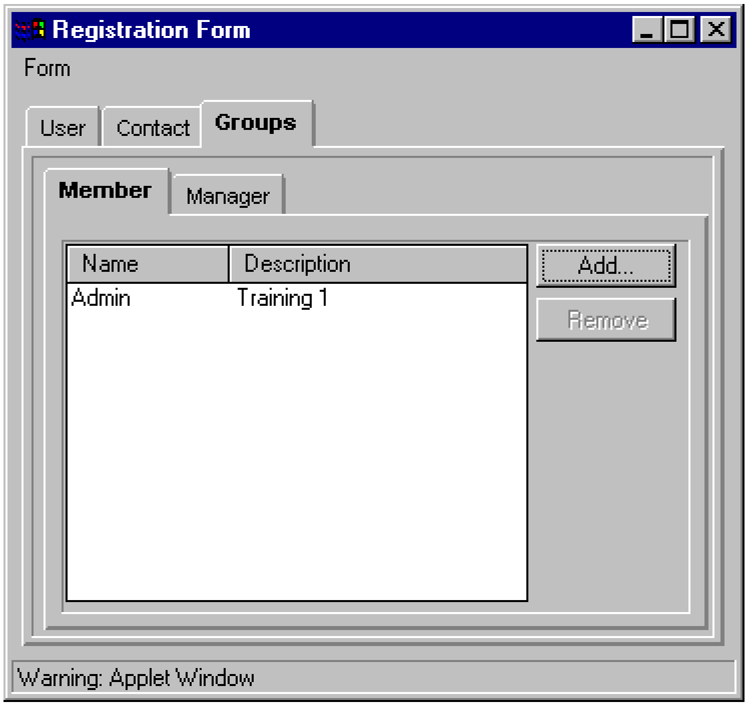

Figure 10: Registration Form - Groups Tab - Member Tab

Note: For a quick way to search a list, refer to the ‘Searching Within A List” section in *Chapter 2: PRweb Desktop*.

Manager Tab

The *Manager* tab allows a registrant to request to be a manager of one or more groups. Managers of groups can use **PR Status Reports** to view PRs that currently reside in PD^2 and were created by members of the groups they manage. For more information on **PR Status Report**, refer to “PR Status Report” section in *Chapter 10: Reports*.

Figure 11: Registration Form – Groups Tab - Manager Tab

1. Click the [**Add**] button to search for a group.

   *The **Group Search** window opens.*

Note: It is not required that a registrant be a manager of a group.

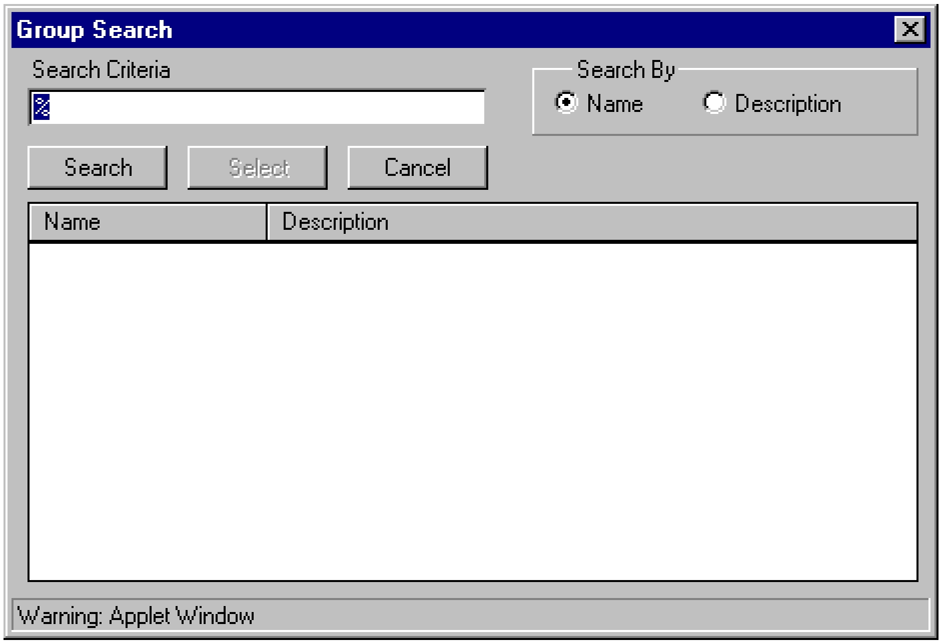

Figure 12: Group Search Window

2. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information regarding searches, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

---

3. Highlight the desired group(s) and click the [**Select**] button.

   The Groups *tab displays with the selected group.*

Note: Multiple groups can be selected by pressing the **<Ctrl**> key and clicking on the desired groups.

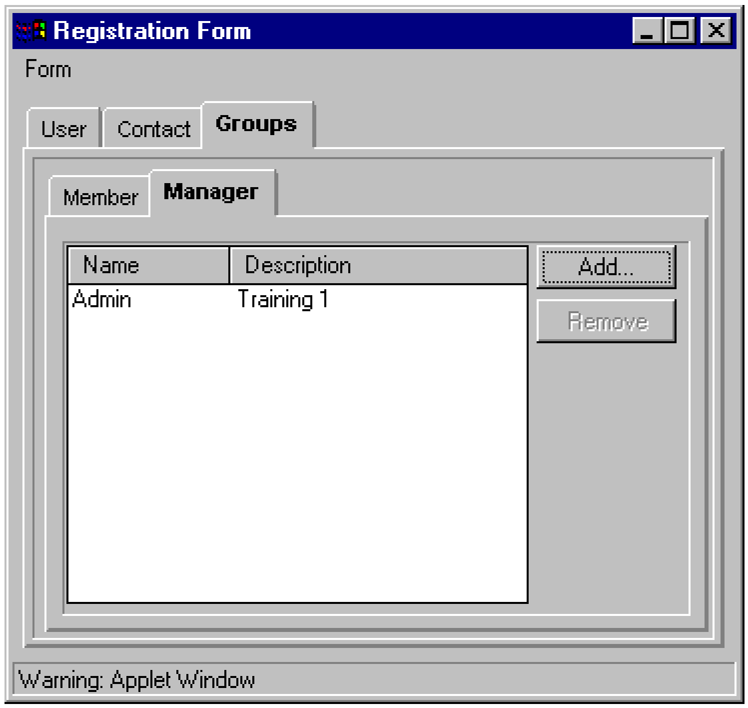

Figure 13: Registration Form – Groups Tab - Manager Tab

Note: For a quick way to search a list, refer to the 'Searching Within A List" section in *Chapter 2: PRweb Desktop*.

---

4. To submit the **Registration Form**, select **Form → Submit** from the **Registration Form** menu bar.

Figure 14: Submit Menu Option

Note: An e-mail alert from the *PRweb* System Administrator is sent to the contact's e-mail address upon registration approval or rejection.

Chapter 2: *PRweb* Desktop

File Menu

The **File** menu provides desktop functions to allow the *PRweb* user to update or exit the desktop. For these purposes, three components are provided in the **File** menu: **Refresh Folder**, **Refresh All**, and **Exit**.

In This Chapter...

Using the functions described in this chapter, you can:

- Understand the desktop functions and components
- Use the Search feature
- Use the Auto-Calendar feature

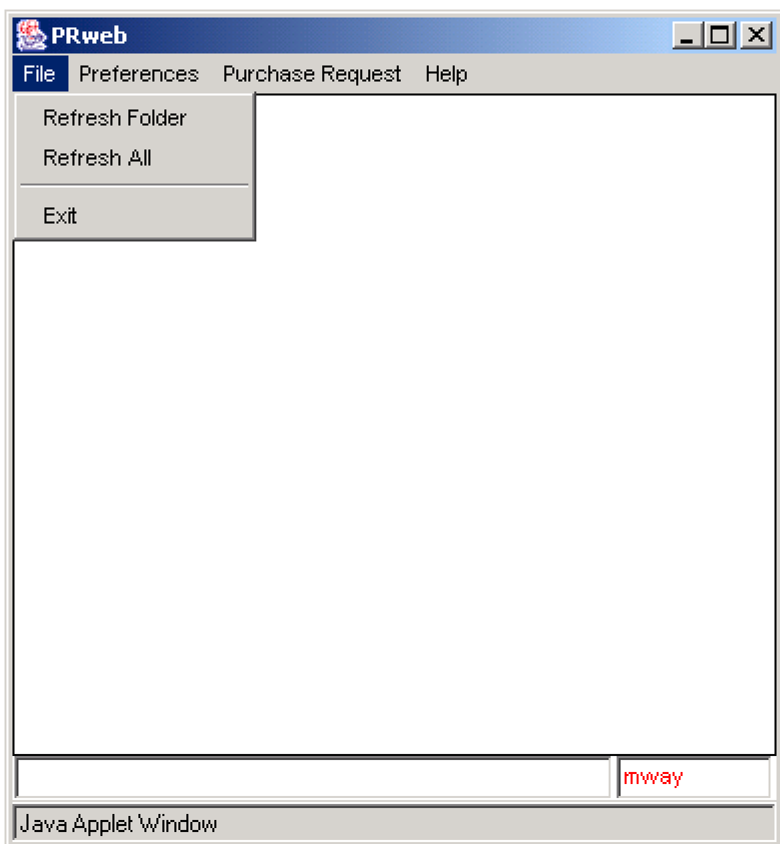

Figure 15: File Menu

Refresh Folder

The **Refresh Folder** menu option allows the *PRweb* user to refresh individual folders to reflect changes. For example, if a user gets an e-mail alert regarding a new PR in his/her **Inbox**, but does not see the PR in that folder, he/she can highlight the *Inbox* folder and select **File → Refresh Folder** from the desktop menu bar. This refreshes the *Inbox* folder with the new information and the PR displays in that folder.

Refresh All

The **Refresh All** menu option allows the *PRweb* user to refresh all folders on the desktop to reflect changes. For example, if a user adds an attachment to a PR but does not see the attachment icon on the desktop, he/she can select **File → Refresh All** from the desktop menu bar. This refreshes all folders on the desktop with any new information. The PR icon now reflects the addition of the attachment.

Exit

PRweb users can exit the desktop by selecting **File → Exit** from the desktop menu bar.

Using Desktop Components

The *PRweb* desktop is a Graphical User Interface (GUI) that provides the user control and interaction with the program.

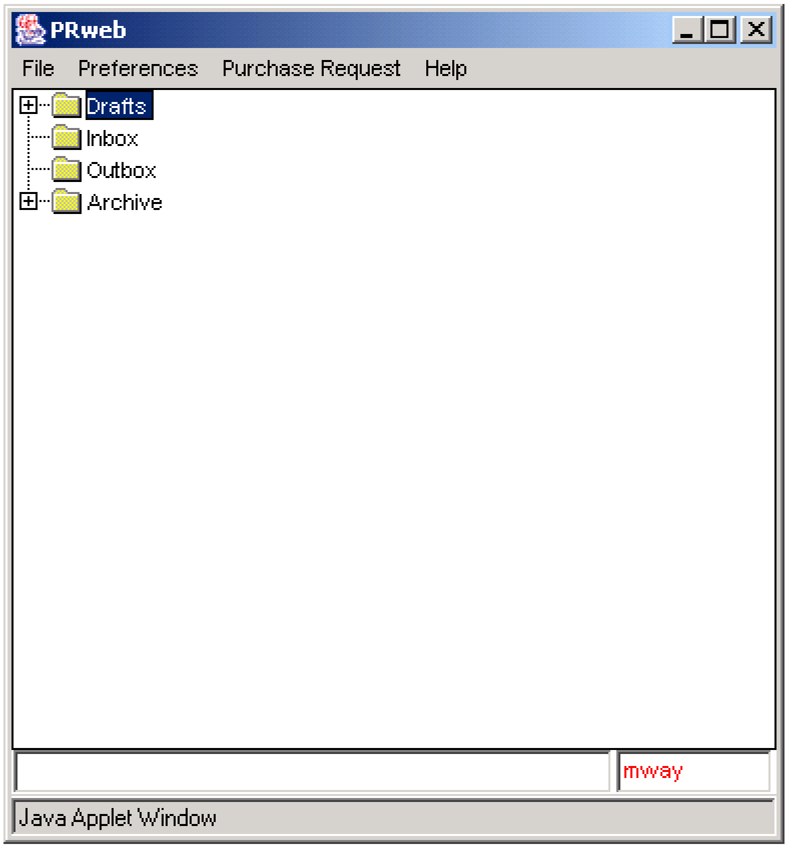

Figure 16: Desktop

Desktop Folders

The *PRweb* desktop is the large white area that holds all of the *PRweb* user's PRs in four folders: *Drafts*, *Inbox*, *Outbox* and *Archive*. Each folder represents a stage in the requirements development process.

- The *Drafts* folder contains PRs that have been created but not yet routed. PRs that have been re-routed back to *PRweb* from PD^2 also display in the *Drafts* folder.
- The *Inbox* folder contains PRs that have been routed to the user for review and approval by another *PRweb* user.
- The *Outbox* folder contains PRs that have been routed to another *PRweb* user.
- The *Archive* folder contains PRs that have proceeded through the approval process in the *PRweb* module and now reside in the PD^2 database.

To access a document contained within a folder:

1. Click on the plus symbol **(+)** to open a folder and display the folder's contents.

   The **(+)** symbol denotes that a closed folder has one or more documents in it.

2. Double-click the document to be opened.

Note: The minus symbol **(-)** that displays directly to the left of an open folder allows the user to close that folder.

Title Bar

A title bar displays the name of the window at the top of every window in the *PRweb* system. Throughout this document, the name contained within the title bar is used as the window name.

Figure 17: Title Bar

Menu Bar

The menu bar allows the user to efficiently and quickly navigate through the various functions and capabilities of the *PRweb* module. The menu bar is the strip of one or more words located across the top of a window, below the title bar. Each word in the menu bar can be selected to activate a drop-down menu. Each drop-down menu contains words that relate to the various options provided in the program that can be selected to link the user to that option.

Figure 18: Desktop Menu Bar

Username

The username is displayed in the bottom right corner of the desktop. This identifies the user who is logged in.

Java Applet Window or Warning: Applet Window

Either the "**Java Applet Window**" or **"Warning: Applet Window"** message displays in the lower left corner of the *PRweb* desktop. It serves as a reminder that the *PRweb* module is not a program that resides on the hard drive of the user's computer, unlike a word processor or a spreadsheet program. The *PRweb* module is a Java Applet, a special type of program that can be used over the Internet.

Search Function

There are two search functions available in *PRweb*, searching the database and searching a list. The searching the database function allows the *PRweb* user to pull information directly from the *PRweb* or PD^2 database. The searching within a list function allows the *PRweb* user to search a list quickly.

Searching the Database

To conduct a search:

1. Click the [**Select**] button for the appropriate **Search** box.

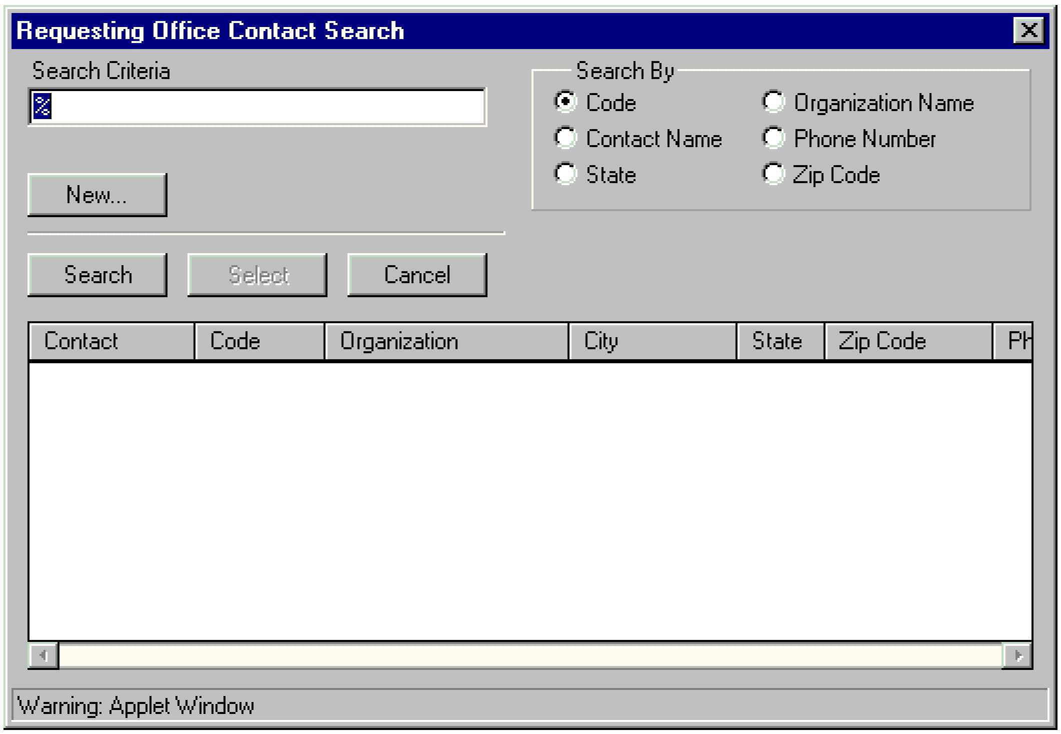

Figure 19: Sample Search Window

2. Qualify the **Search Criteria** field by selecting the desired **Search By** radio button.

   The **Search By** radio buttons enables the *PRweb* user to perform searches by specific categories. The search results display the specific category alphabetically.

3. Define the criteria in the **Search Criteria** field.

   The **Search Criteria** field allows the *PRweb* user to further define and refine the search parameters. The *PRweb* module employs the universal search symbol (%) to aid in the search process. The universal search symbol pulls all information pertaining to the designated search parameter. For example, "A%" in the **Requesting Office Contact- Search** field displays all vendors beginning with the letter A. The % may also be used to search for a keyword. For example, "%Army%" in the **Requesting Office Contact Search** field displays all Requesting Offices containing the word "Army."

Note: The **Search Criteria** field is case-sensitive.

4. Click the [**Search**] button.

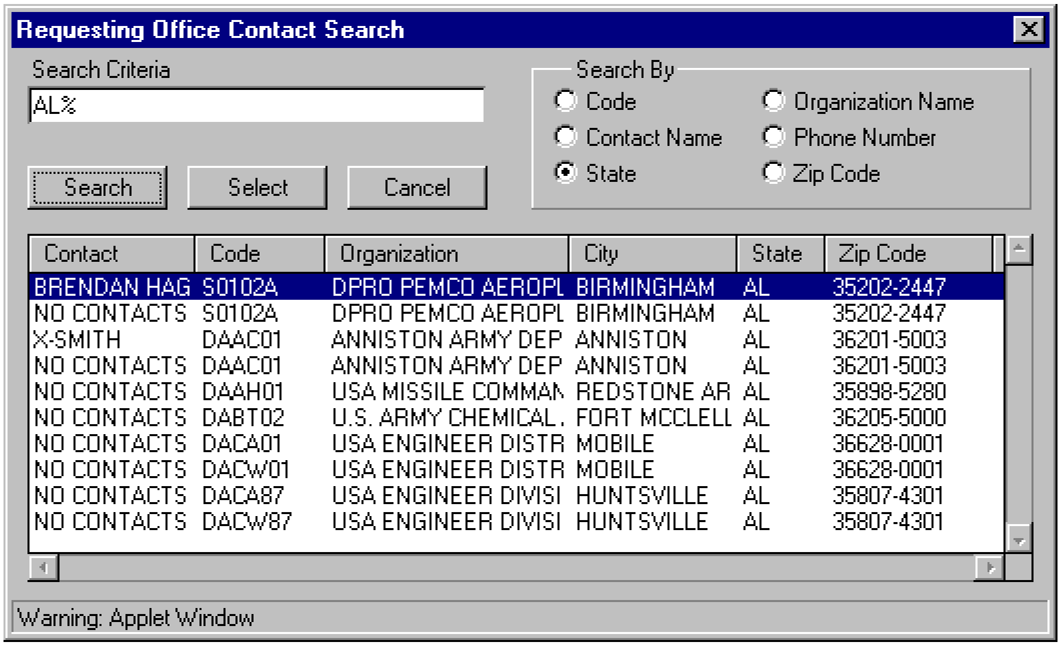

Figure 20: Sample Search Results

5. Highlight the desired result and click the [**Select**] button.

Searching Within A List

To conduct a search:

1. Click on the appropriate list.

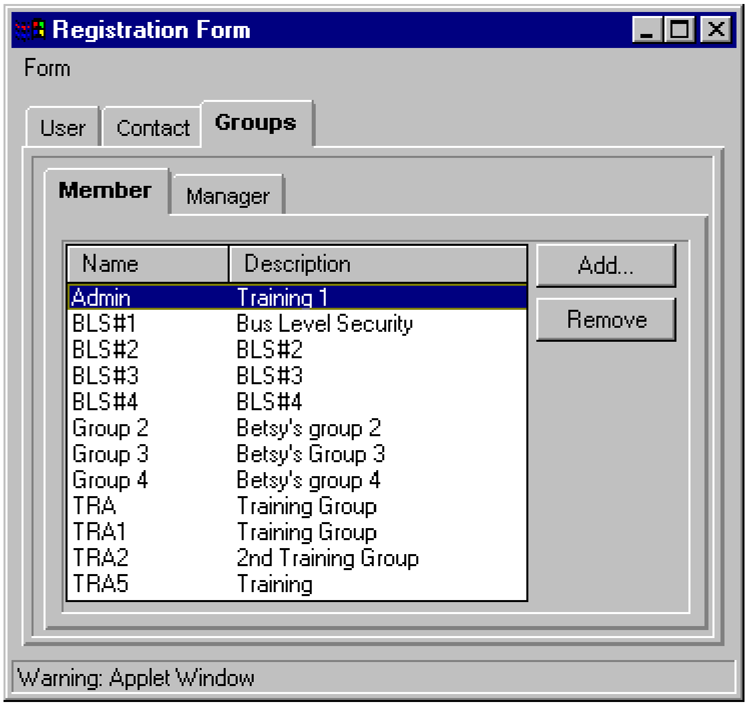

Figure 21: Registration Form - Groups Tab - Member Tab

2. Enter search text.

   *The **Starts with** window opens.*

Note: More than one character may be typed in the **Search Text** field.

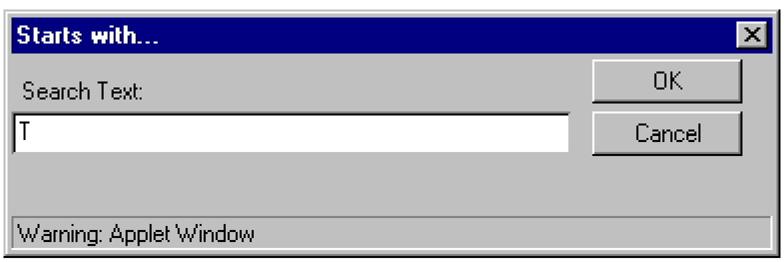

Figure 22: Starts With Window

3. Click [**OK**].

   The search results is highlighted.

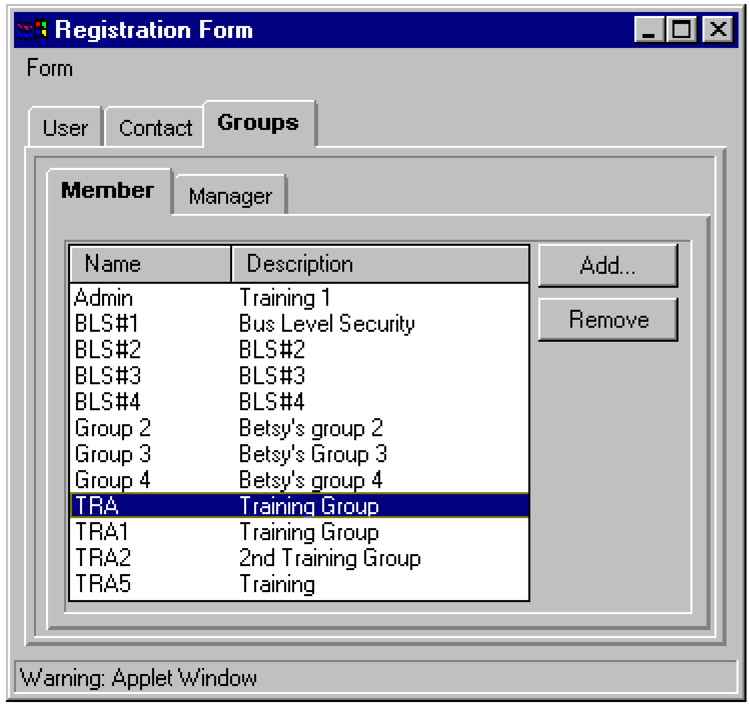

Figure 23: Registration Form - Groups Tab - Member Tab

Auto-Calendar Feature

The **Auto-Calendar** feature allows the *PRweb* user to quickly select a date from a calendar interface.

To use the **Auto-Calendar** feature:

1. Place the cursor inside the field that requires a date.

2. Press **<Shift>** and double-click the left mouse button.

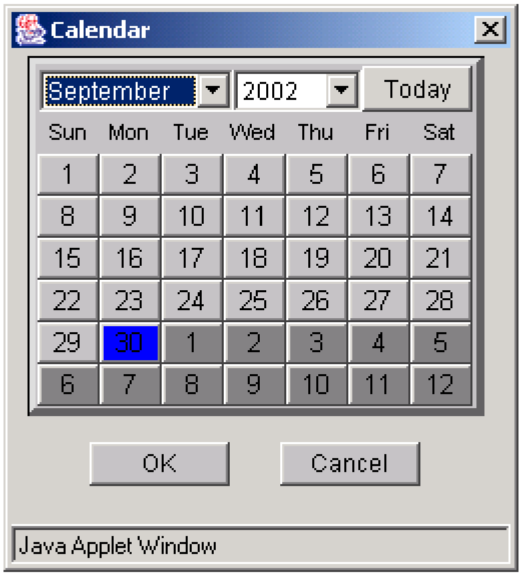

Figure 24: Calendar Window

Note: A calendar displays with the current date as the default.

Note: Clicking on the auto-calendar icon also displays the calendar. 

---

3. Use the **Month** drop-down list box to select a different month if necessary.

4. Use the **Year** drop-down list box to select a different year.

5. Click the desired day of the month in the calendar that displays.

6. Double-click the appropriate date or single-click a date and click [**OK**] to select and close the calendar.

Chapter 3: Account Maintenance

The *PRweb* desktop allows the requesting agent to successfully perform procurement-related tasks. A requesting agent in *PRweb* has the capability of creating, viewing, editing, routing and approving PRs from the *PRweb* desktop. Maintenance of the *PRweb* user account allows the user to access *PRweb*, become familiar with desktop functionality and set user preferences.

In This Chapter…

This chapter introduces the basic information needed to begin working with AcquiLine *PRweb*. This includes:

- Customizing the user account

Customizing the User Account

The **Preferences** menu allows the *PRweb* user to customize his/her user options. The **Preferences** menu contains five options: **Change Archive Days**, **Change Password**, **Route Templates, Change E-mail Address,** and **Out of Office**.

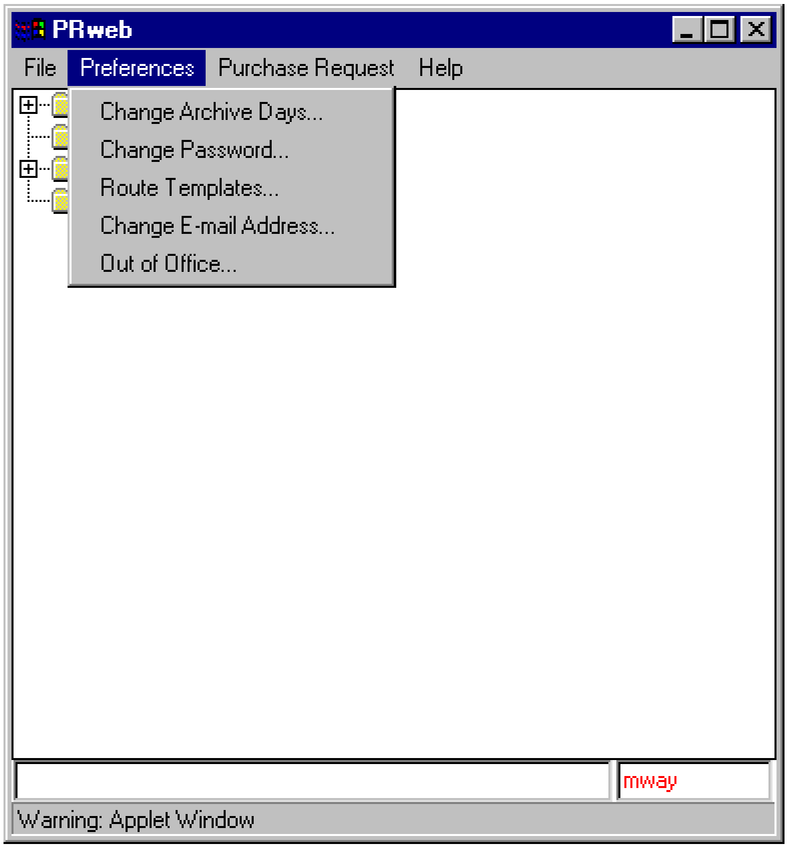

Figure 25: Preferences Menu Option

Change Archive Days

The **Change Archive Days** menu option allows the *PRweb* user to specify the number of days that PRs are displayed in the *Archive* folder. Changing the number of days overwrites the default set by the System Administrator.

To change the number of archive days:

1. From the menu, select **Preferences → Change Archive Days**.

   *The **Archive Days** window opens.*

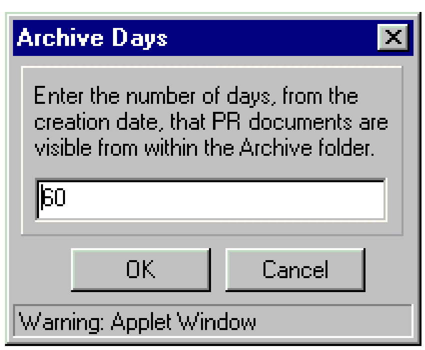

Figure 26: Archive Days Window

2. Enter the desired number of days.

3. Click [**OK**] to save the Archive Days setting.

   *The **Attention** window opens.*

Figure 27: Attention Window

4. Click [**OK**] to return to the *PRweb* desktop.

Change Password

The **Change Password** feature allows the *PRweb* user to change his/her login password.

To change passwords:

1. From the menu, select **Preferences → Change Password**.

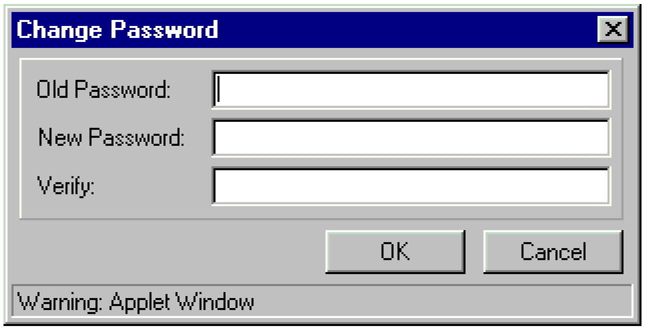

Figure 28: Change Password Window

2. Enter the current password in the **Old Password** field.

   This is a required field.

3. Enter the desired password in the **New Password** field.

   This is a required field.

Note: The password entered must be a minimum of 8 characters including one or more special characters (e.g., "%" or "#").

---

4. Re-enter the desired password in the **Verify** field.

   This is a required field.

5. Click [**OK**] to change the password.

   *The **Attention** window opens.*

Figure 29: Attention Window

6. Click [**OK**] to return to the *PRweb* desktop.

Route Templates

The **Route Templates** feature allows the *PRweb* user to create his/her own specific route templates to complement current approval processes. Only users with appropriate security rights can create route templates. Members of security groups that only have routing access to specific templates can choose from those templates to which they are assigned when routing a PR. The routing sheet populates with the contents of the template. Therefore, the order in which users are put on the route template is the order in which the PR is routed.

Creating a Route Template

The *PRweb* user can create new route templates. Route templates can be created to complement current approval processes.

To create a route template:

1. From the menu, select **Preferences → Route Templates**.

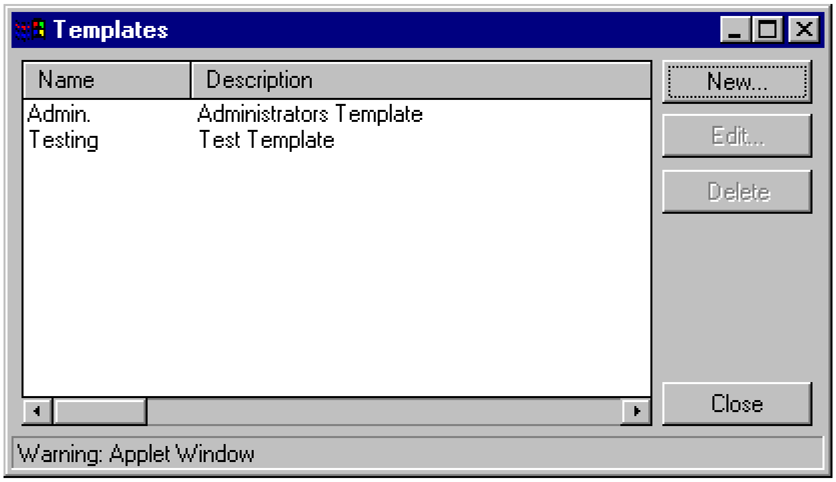

Figure 30: Templates Window

Note: For a quick way to search a list, refer to the 'Searching Within A List" section in *Chapter 2: PRweb Desktop*.

2. Click the [**New**] button.

   *The **Template – New** window opens.*

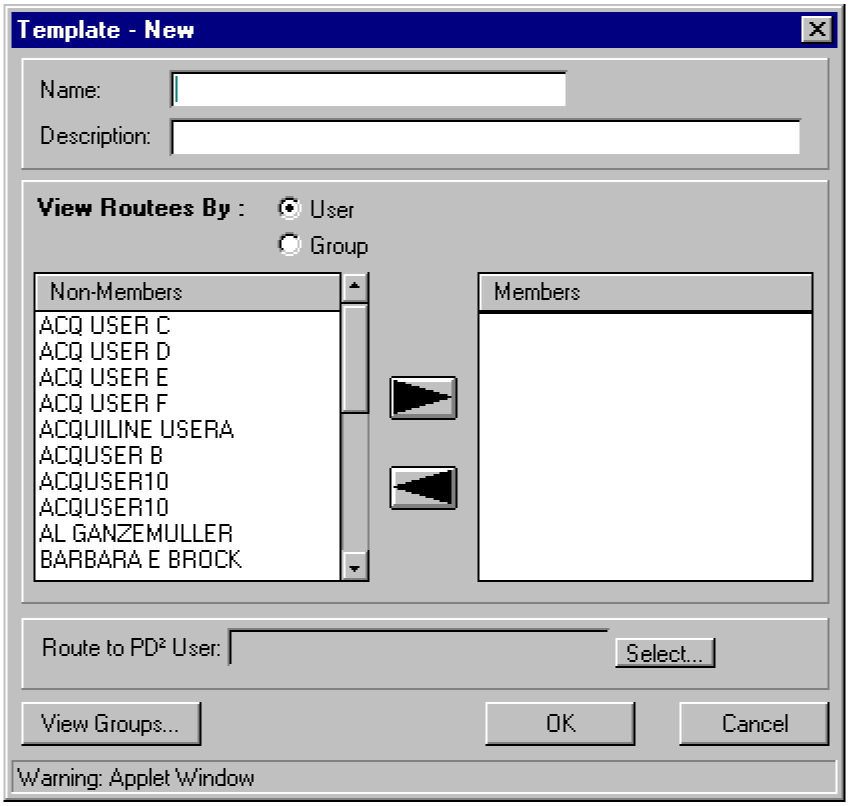

Figure 31: Template – New Window

3. Enter a unique template name in the **Name** field.

   A unique name is required for each template. The **Name** field holds up to 30 characters.

4. Enter a description for the new template in the **Description** field.

   The template description allows the System Administrator to further clarify the route template he/she is creating. The **Description** field holds up to 255 characters.

5. Select members for the new template by highlighting desired users from the **Non-Members** list box and clicking the [▶] button.

Note: For a quick way to search a list, refer to the 'Searching Within A List" section in *Chapter 2: PRweb Desktop*.

Note: The **Non-Members** list box displays all available users to add to the route template. As users are added to the route template their usernames display in order selected in the **Members** list box and are subsequently removed from the **Non-Members** list box. Members can be removed from the route template by highlighting the desired user from the **Members** list box and clicking the [◀] button.

6. Select the **Group** radio button from the **View Routees By** field.

7. Select a member from the **Non-Members** list.

8. Click the [**View Group**] button.

   *The **Groups (Read Only)** window opens.*

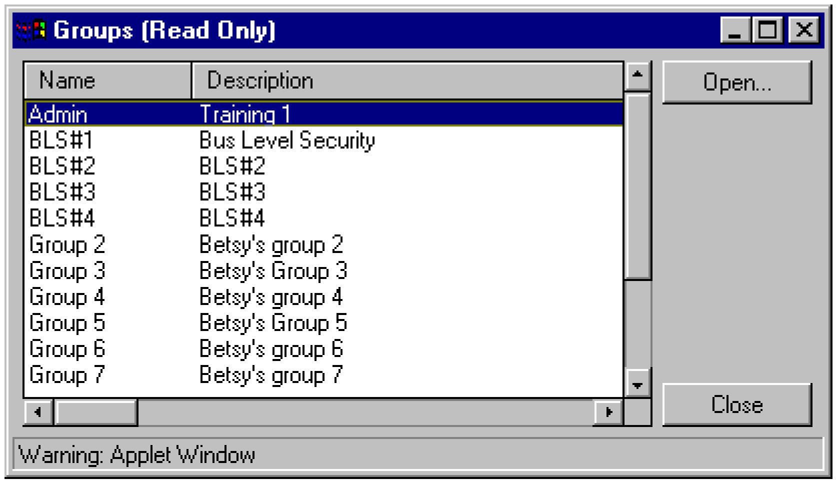

Figure 32: Groups (Read Only) Window

9. Click the [**Close**] button to return to the **Template – New** window.

10. Click [**OK**] to save the new template and return to the **Templates** window.

11. Click the [**Select**] button next to the **Route to PD^2 User** field.

    *The **Select PD^2 User** window opens.*

Figure 33: Select PD^2 User Window

12. Highlight the appropriate Contract Official.

13. Click the [**Select**] button.

    *The PD^2 user selected displays in the **Route to PD^2 User** field on the routing sheet.*

Note: At least one member and a PD^2 user must be added to the new template before saving it.

14. Click [**OK**] to save the new template and return to the **Templates** window.

15. Click the [**Close**] button to return to the user's desktop.

Editing a Route Template

The *PRweb* user can edit existing route templates to add or remove users from the template.

To edit a route template:

1. From the menu, select **Preferences → Route Templates**.

    *The **Templates** window opens.*

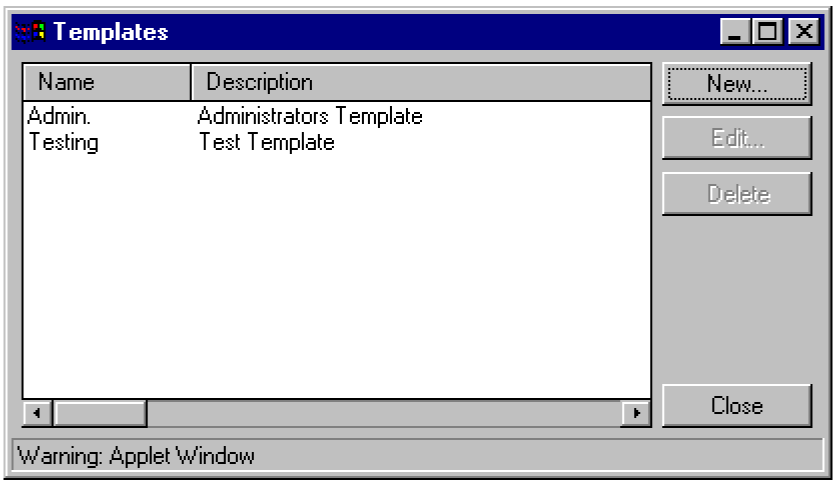

Figure 34: Templates Window

2. Highlight the route template to be edited.

Note: For a quick way to search a list, refer to the 'Searching Within A List" section in *Chapter 2: PRweb Desktop*.

3. Click the [**Edit**] button.

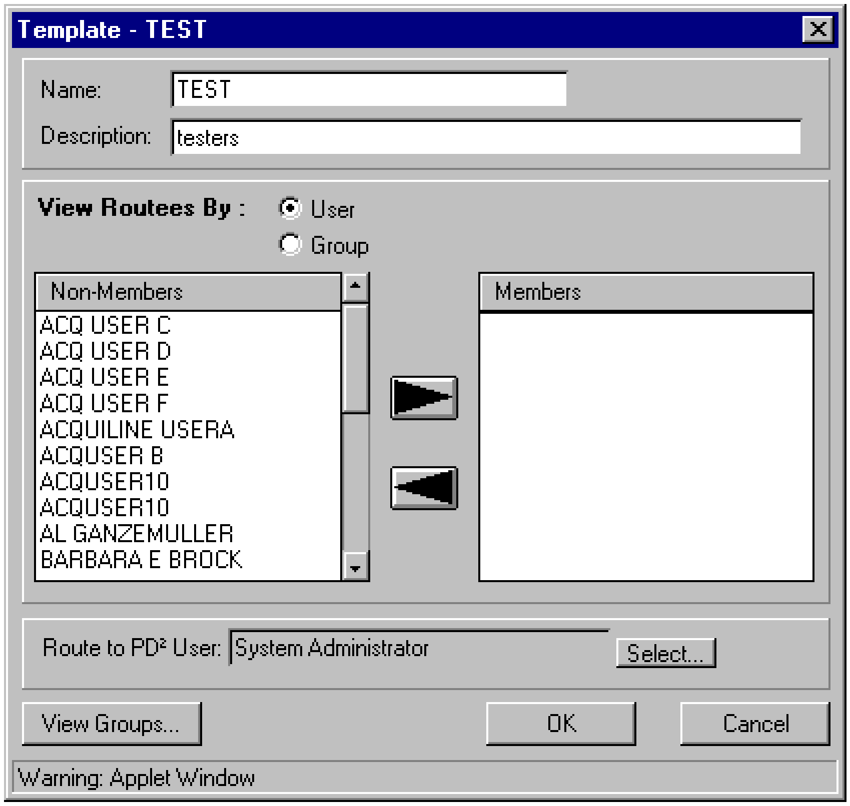

Figure 35: Template - <Template Name> Window

4. Edit the template description in the **Description** field if necessary.

Note: The name in the **Name** field is not editable.

5. Select additional members for the template by highlighting desired users from the **Non-Members** list box and clicking the [▶] button.

Note: For a quick way to search a list, refer to the 'Searching Within A List" section in *Chapter 2: PRweb Desktop*.

Note: The **Non-Members** list box displays all available users to add to the route template. As users are added to the route template their usernames display in order in the **Members** list box and are subsequently removed from the **Non-Members** list box. Members may be removed from the route template by highlighting the desired user from the **Members** list box and clicking the [◀] button.

6. Select the **Group** radio button from the **View Routees By** field.

7. Edit the members from the **Non-Members** list if necessary.

8. Click [**OK**] to save the new template and return to the **Templates** window.

9. Click the [**Select**] button next to the **Route to PD^2 User** field to change the PD^2 user.

   *The **Select PD^2 User** window opens.*

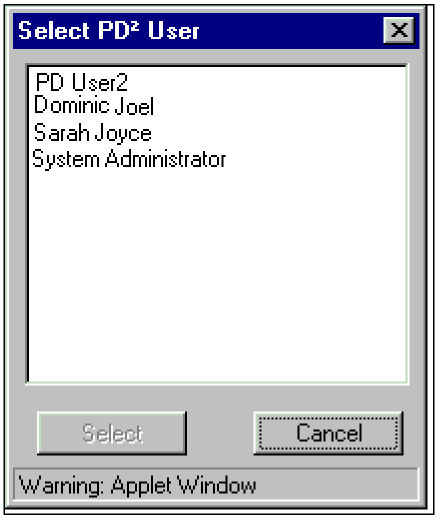

Figure 36: Select PD^2 User Window

10. Highlight the appropriate Contract Official.

11. Click the [**Select**] button.

    *The PD^2 user selected displays in the **Route to PD^2 User** field on the routing sheet.*

Note: At least one member and a PD^2 user must be included on the template before saving it.

---

12. Click [**OK**] to save the changes and return to the **Templates** window.

13. Click the [**Close**] button to return to the user's desktop.

Deleting a Route Template

The *PRweb* user can delete existing route templates.

To delete a route template:

1. From the menu, select **Preferences→ Route Templates**.

   *The **Templates** window opens.*

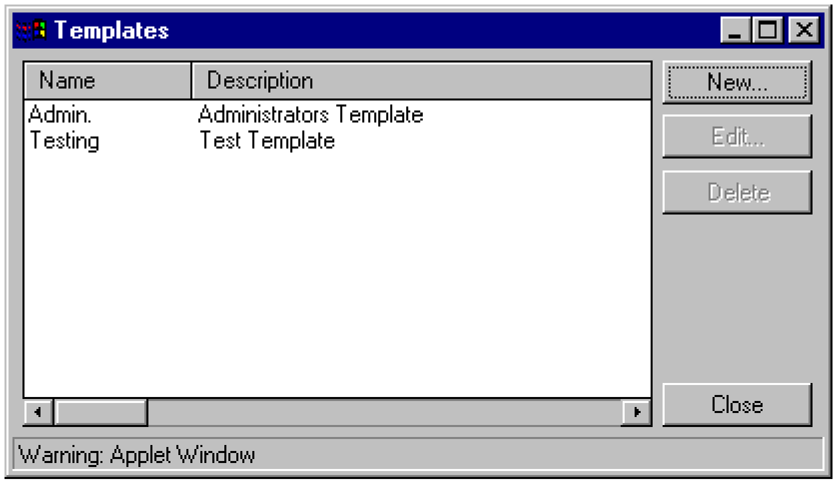

Figure 37: Templates Window

2. Highlight the route template to be deleted.

Note: For a quick way to search a list, refer to the 'Searching Within A List" section in *Chapter 2: PRweb Desktop*.

3. Click the [**Delete**] button.

   *The **Confirmation** window opens.*

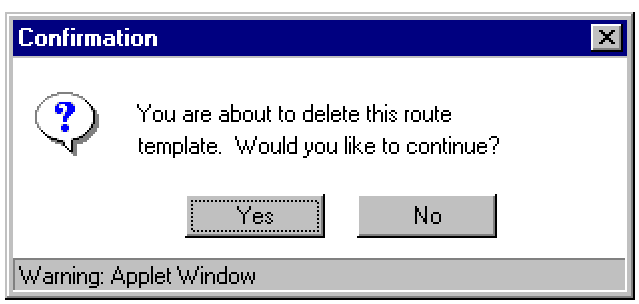

Figure 38: Confirmation Window

4. Click the [**Yes**] button.

Change E-mail Address

The **Change E-mail Address** feature allows the *PRweb* user to change their e-mail address as defined in the contact information. The e-mail address denotes where all *PRweb* generated alerts are sent.

To change your e-mail address:

1. From the menu, select **Preferences→ Change E-mail Address**.

   The ***Update E-mail Address*** *window opens.*

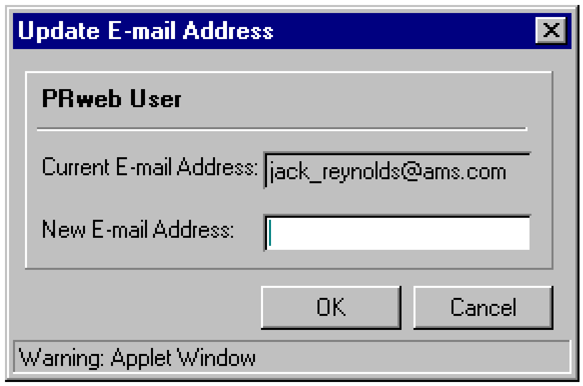

Figure 39: Update E-mail Address Window

2. Enter the new e-mail address in the **New E-mail Address field**.

3. Click [**OK**] to save the changes.

Out of Office

The **Out of Office** feature allows the *PRweb* user to specify a date range that the user will be away. The user can also specify another *PRweb* user that the "out of office" user's workload will be forwarded to while the "out of office" user is away. E-mail notification is sent to the "out of office" user informing the user that a PR or PR Mod has been forwarded to the designated alternate. Once the Last Day Out of Office passes, the user's workload will not be forwarded to the designated user.

To specify out of office information:

1. From the menu, select **Preferences → Out of Office**.

   Out of Office *window opens.*

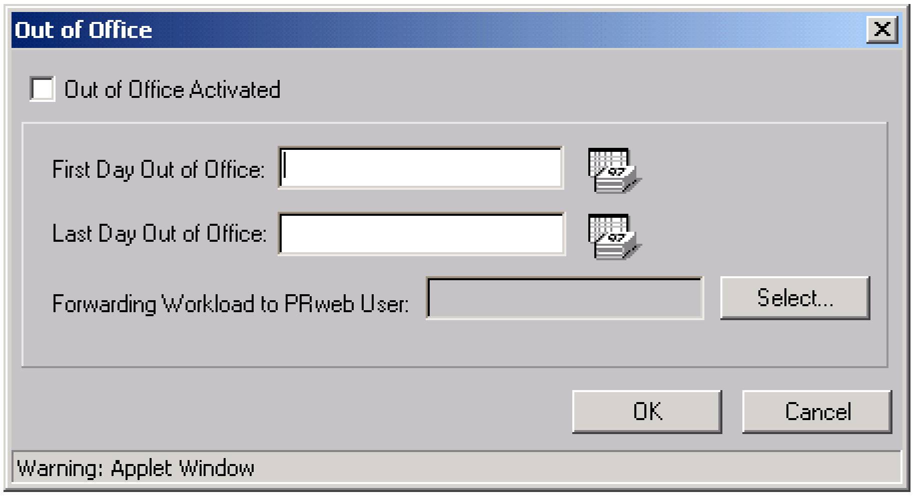

Figure 40: Out of Office Window

2. Select the **Out of Office Activiated** check box.

3. Enter the appropriate date in the **First Day Out of Office** field.

   This is a required field.

4. Enter the appropriate date in the **Last Day Out of Office** field.

   This is a required field.

Note: The **First Day Out of Office** and **Last Day Out of Office** dates can be entered manually or by using the Auto-Calendar feature. For more information on the Auto-Calendar, refer to "Auto-Calendar Feature" section in *Chapter 2: PRweb Desktop*.

---

5. Click the [**Select**] button next to the **Forwarding Workload to PRweb User** field.

   The ***Select PRweb User*** *window opens.*

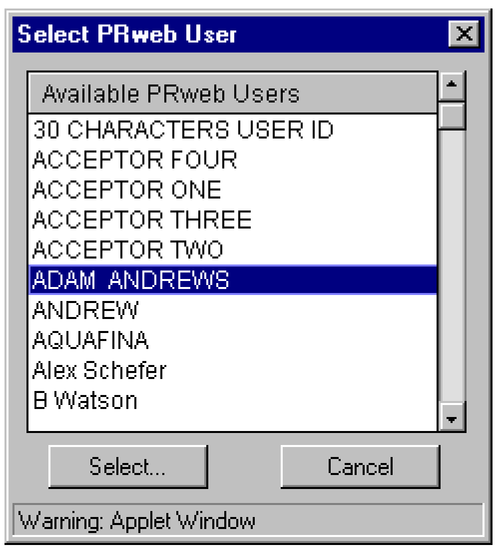

Figure 41: Select PRweb User Window

6. Highlight the user and click the [**Select**] button to select the desired user.

   *The selected user displays in the **Out of Office** window.*

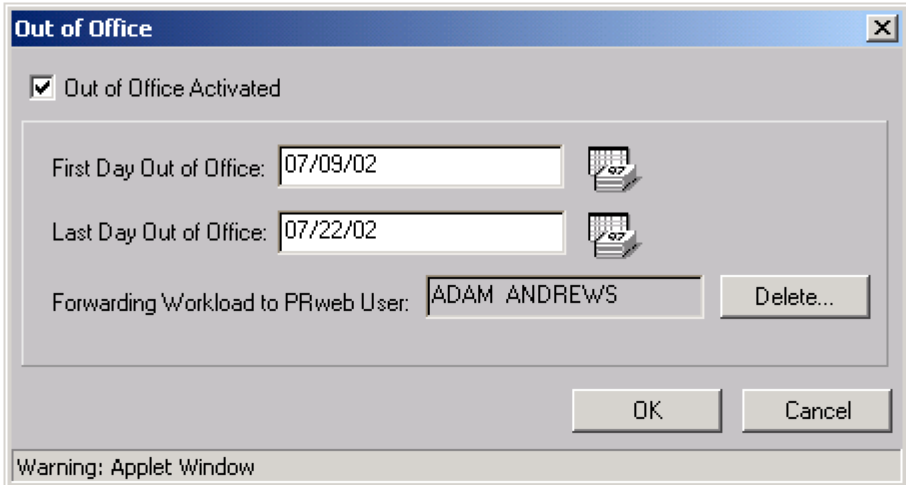

Figure 42: Out of Office Window

7. Click [**OK**] to save the Out of Office configuration.

8. Click [**Cancel**] to cancel the Out of Office configuration.

To remove out of office information:

1. From the menu, select **Preferences → Out of Office**.

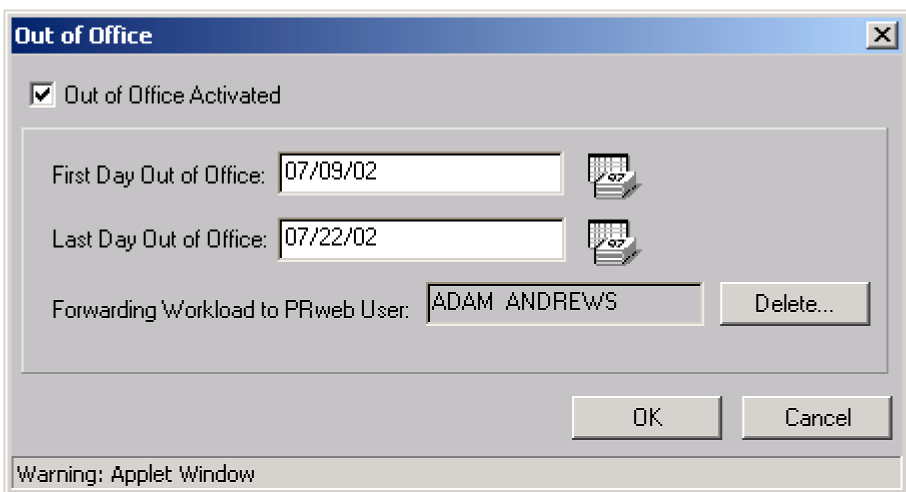

Figure 43: Out of Office Window

2. Clear the **Out of Office Activated** check box.

   *The **First Day Out of Office**, **Last Day Out of Office**, and **Forwarding Workload to PRweb User** fields are cleared.*

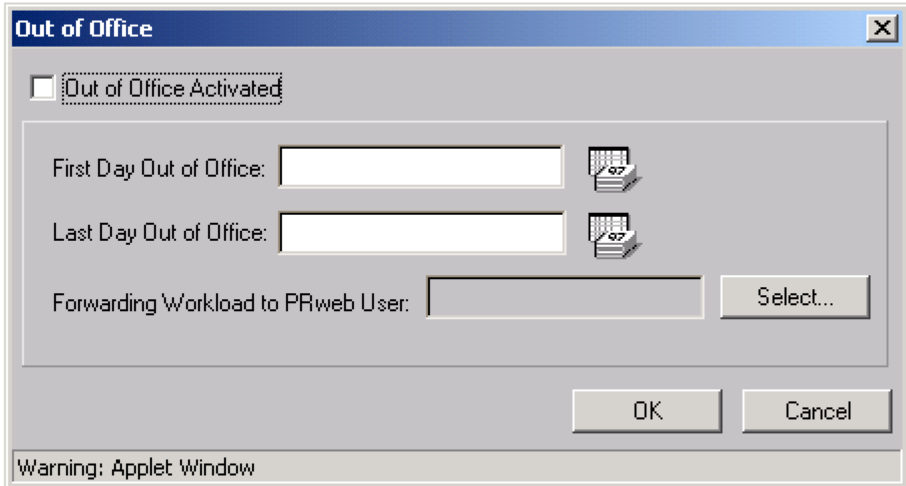

Figure 44: Out of Office Window

3. Click [**OK**] to save the Out of Office configuration.

4. Click [**Cancel**] to cancel the Out of Office configuration.

Chapter 4: Purchase Request

The **Purchase Request** (PR) document is the principle document supported within *PRweb*. The *PRweb* module allows the requesting agent to create, route, approve, and submit the PR to the Contracting Office. The electronic interchange of the PR, and the ability of the requesting agent to track the status of the PR, provides an integrated solution to support paperless acquisition.

In This Chapter…

Using the Purchase Request functions described in this chapter, you can:

- Create and Manage PRs
- Manage Funding Sources
- Manage Funding Strips
- Manage Job Orders

Creating a New Purchase Request

To create a new Purchase Request:

1. From the menu, select **Purchase Request → New**.

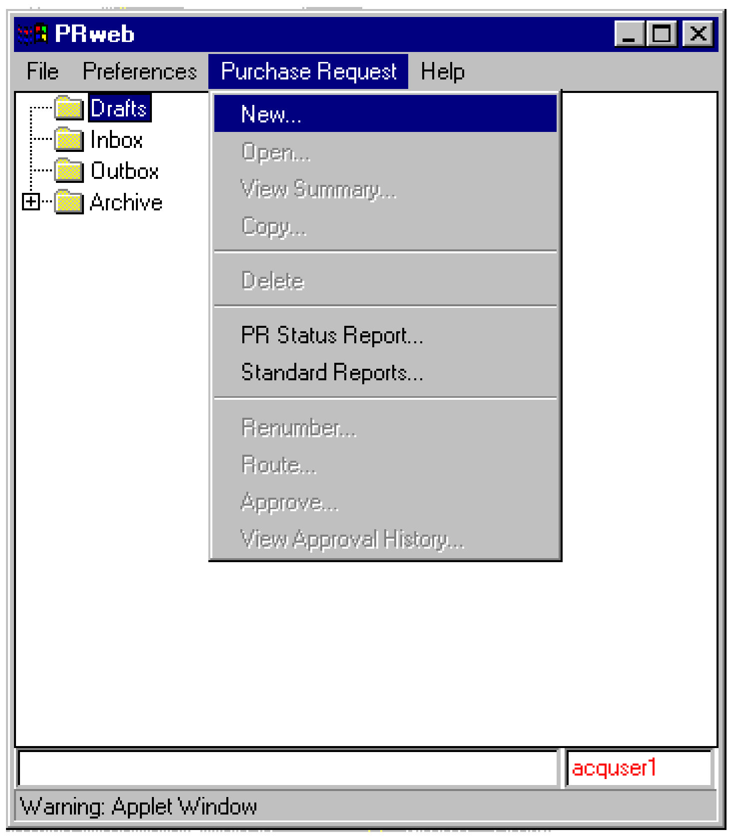

Figure 45: New Purchase Request Menu Option

*The PR Header displays at the top of the **Purchase Request** window and is visible from every tab of the **Purchase Request** window.*

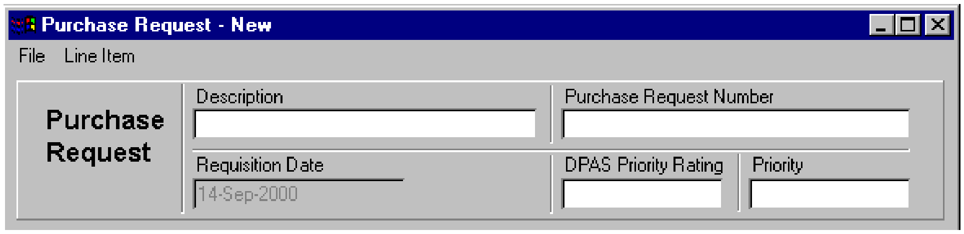

Figure 46: Purchase Request Header

2. Enter a description in the **Description** field.

   The Purchase Request description allows the *PRweb* user to assign a descriptive reference of up to 60 characters. This field is required to save a PR.

3. Enter a unique number in the **Purchase Request Number** field.

   The Purchase Request number allows the *PRweb* user to assign a unique alphanumeric combination of up to 30 characters to the PR. Duplicate PR numbers are not allowed. This field is required to save a PR.

4. Enter the Defense Priority Allocation System (DPAS) Priority Rating in the **DPAS Priority Rating** field.

   This field holds up to 6 characters.

5. Enter the appropriate priority number in the **Priority** field.

   This field holds any number between 1 and 15.

Note: The *PRweb* module automatically assigns a date/time stamp called the **Requisition Date**, to the PR upon creation. This field is not editable.

Main Form Tab

The Purchase Request opens to the *Main Form* tab. The *Main Form* tab contains information regarding the **Requesting Office**, **Issuing Office**, **Suggested Vendors**, **Type of Action** and **Comments**.

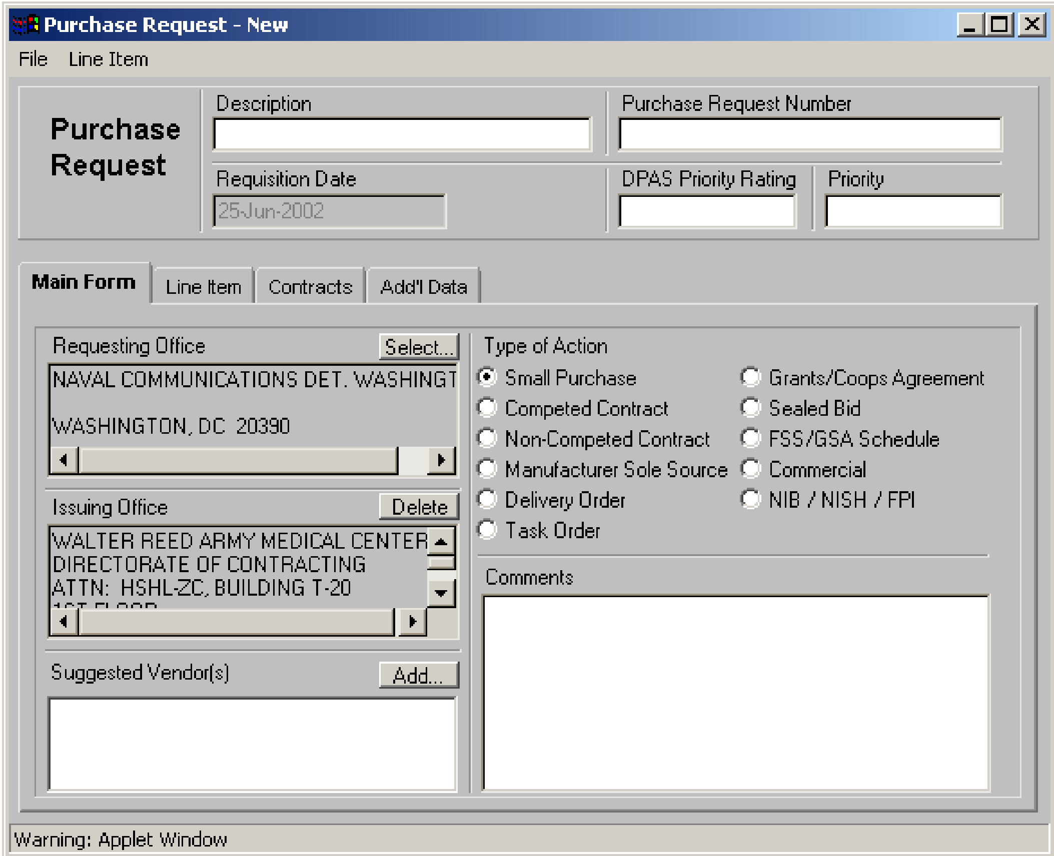

Figure 47: Purchase Request - New – Main Form Tab

1. Select the appropriate **Type of Action** radio button.

Note: The **Requesting Office** and **Issuing Office** fields default to the Requesting Office defined in the creator's user account on the *Contacts* tab.

2. Click the [**Select**] button next to the **Requesting Office** field.

*The **Requesting Office Address Search** window opens.*

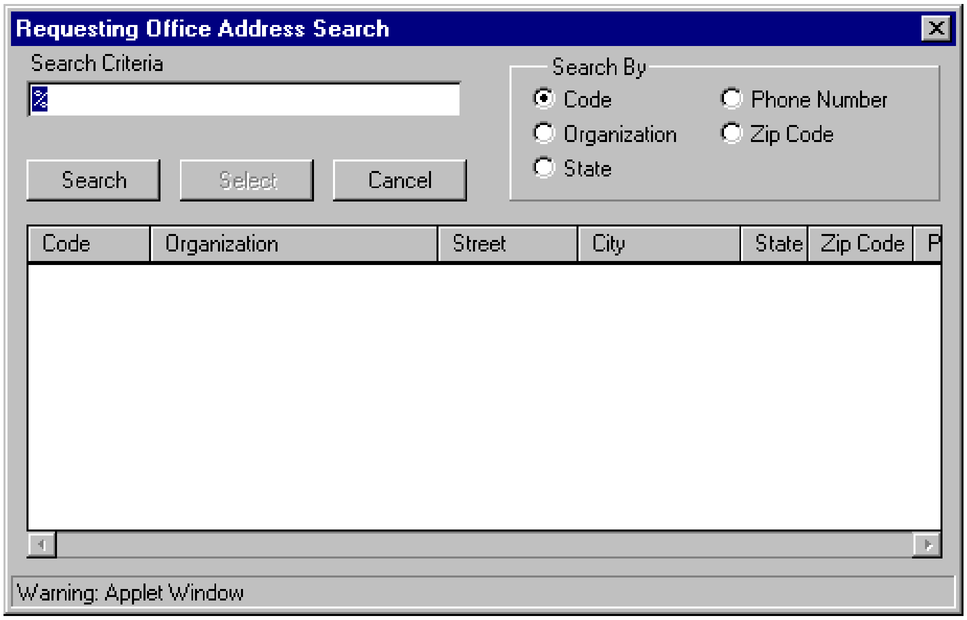

Figure 48: Requesting Office Address Search Window

3. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information regarding searches, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

4. Highlight the desired Requesting Office Address.

5. Click the [**Select**] button.

   The Main Form *tab displays with the selected Requesting Office in the **Requesting Office Address** field.*

6. Click the [**Select**] button next to the **Issuing Office Address** field.

*The **Issuing Office Address Search** window opens.*

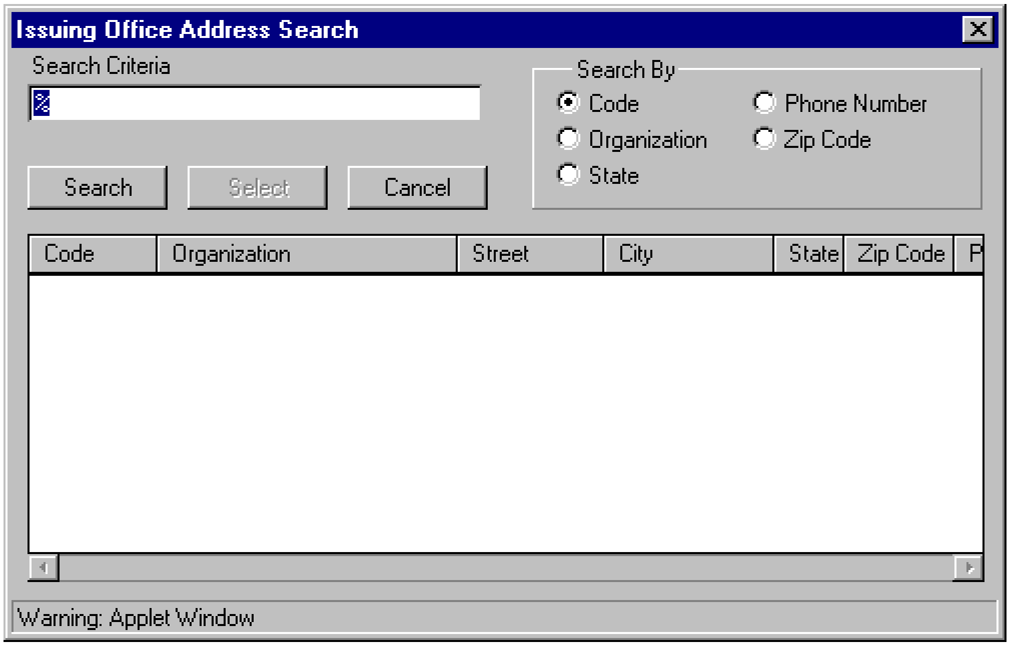

Figure 49: Issuing Office Address Search Window

7. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information regarding searches, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

8. Highlight the desired Issuing Office Address.

9. Click the [**Select**] button.

   The Main Form *tab displays with the selected Issuing Office in the **Issuing Office Address** field.*

10. Click the [**Add**] button next to the **Suggested Vendor(s)** field.

    The **Suggested Vendor(s)** field allows the *PRweb* user to identify potential suppliers/contractors for the request. Vendor information is pulled from the PD^2 database. The *PRweb* module user cannot create new vendor profiles; the Contracting Office must do this via PD^2.

*The **Vendor Address Search** window opens.*

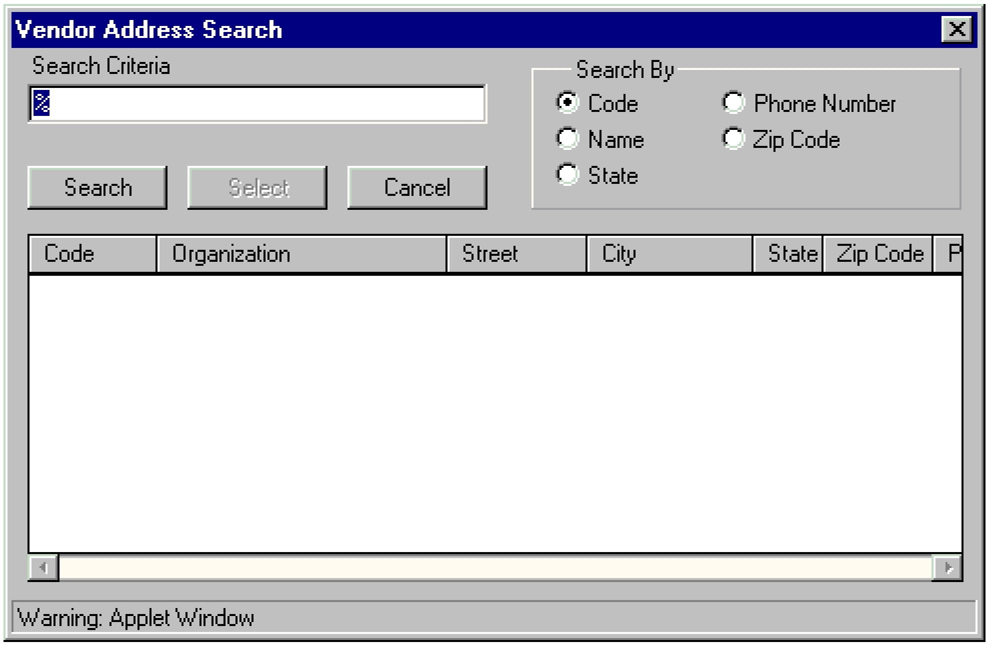

Figure 50: Vendor Address Search Window

11. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information regarding searches, refer to “Search Function” section in *Chapter 2: PRweb Desktop*.

12. Highlight the desired Vendor Address.

13. Click the [**Select**] button.

    The Main Form *tab displays with the selected vendor(s) in the **Suggested Vendor(s)** field.*

Note: The [**Add**] button becomes the [**More**] button after selecting one **Suggested Vendor(s)**.

14. Enter comments about the requirement into the **Comments** field.

    This field holds up to 255 characters.

Additional Suggested Vendors

1. Click the [**More**] button next to the **Suggested Vendor(s)** field.

   *The **Vendor Summary View** window opens.*

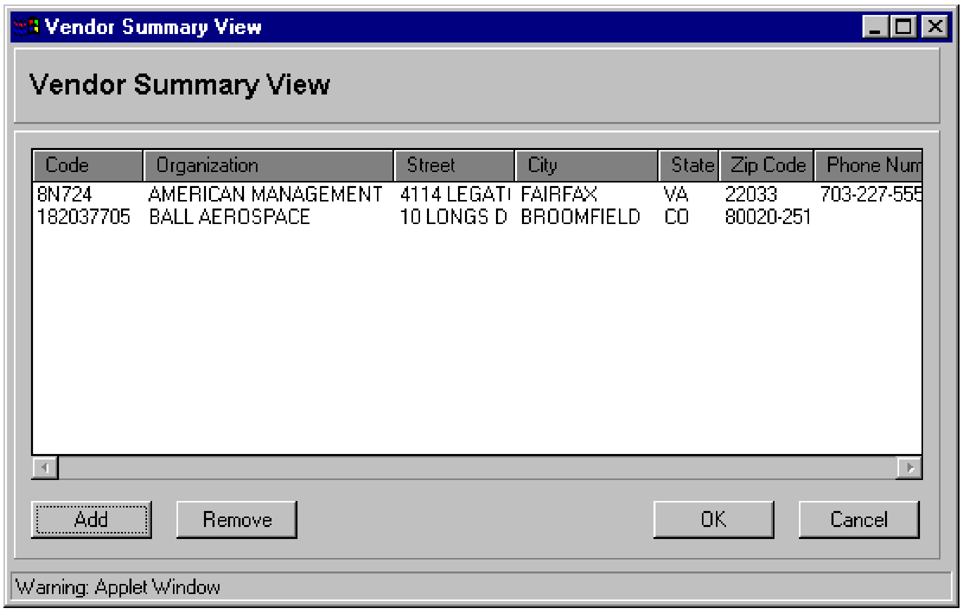

Figure 51: Vendor Summary View Window

2. Click the [**Add**] button.

   *The **Vendor Address Search** window opens.*

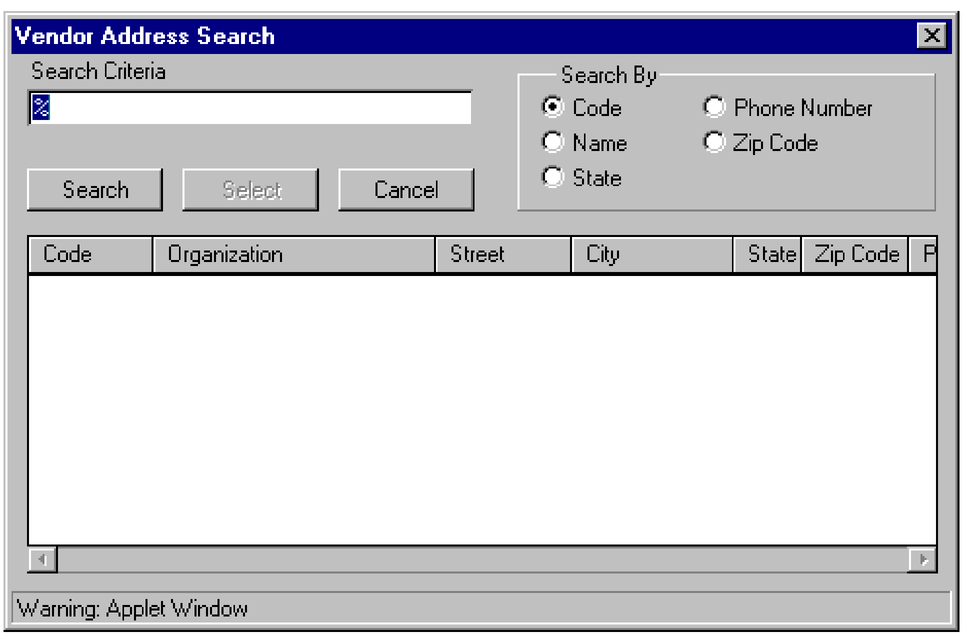

Figure 52: Vendor Address Search Window

3. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information regarding searches, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

---

4. Highlight the desired Vendor Address.
5. Click the [**Select**] button.

   The Main Form *tab displays with the selected vendor(s) in the **Suggested Vendor(s)** field.*

Remove Suggested Vendor

1. Click the [**More**] button next to the **Suggested Vendor(s)** field.

   *The **Vendor Summary View** window opens.*

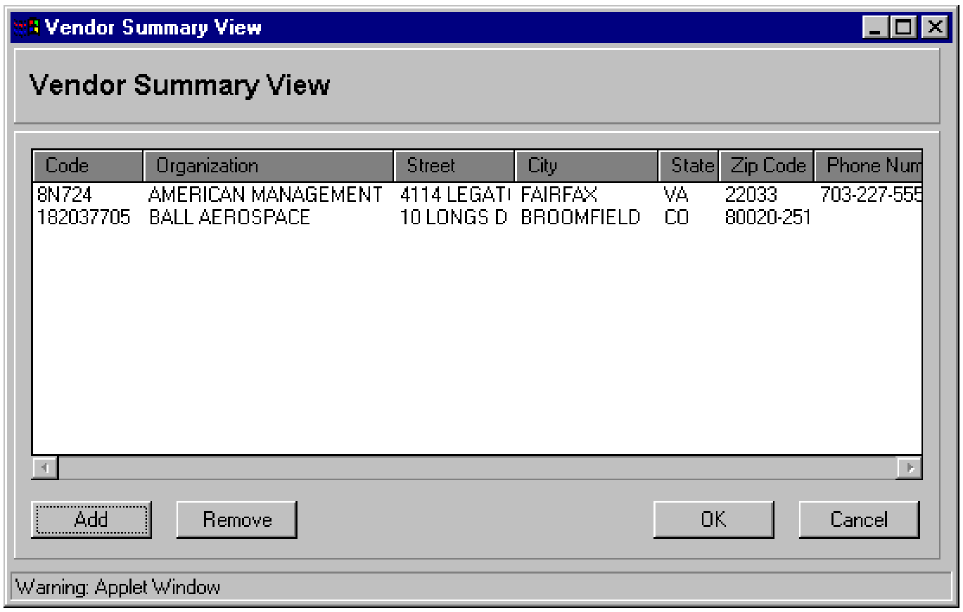

Figure 53: Vendor Summary View Window

2. Highlight one or more vendors and click the [**Remove**] button.
3. Click [**OK**] to return to the *Main Form* tab.

Line Item Tab

The *Line Item* tab of the PR provides a summary of the line items on the PR. This summary provides general information on line items for a PR such as **Number**, **Description**, **Quantity**, **Unit of Issue**, **Unit Cost,** and **Total Cost**.

In *PRweb*, funding may be handled at the contract level or at the line item level. Contract level funding may be entered on the *Line Item* tab. To establish line item level funding, the information may be added on the *Funding* tab in the **Line Item Detail** window. To create a line item refer to *Chapter 6: Line Item*.

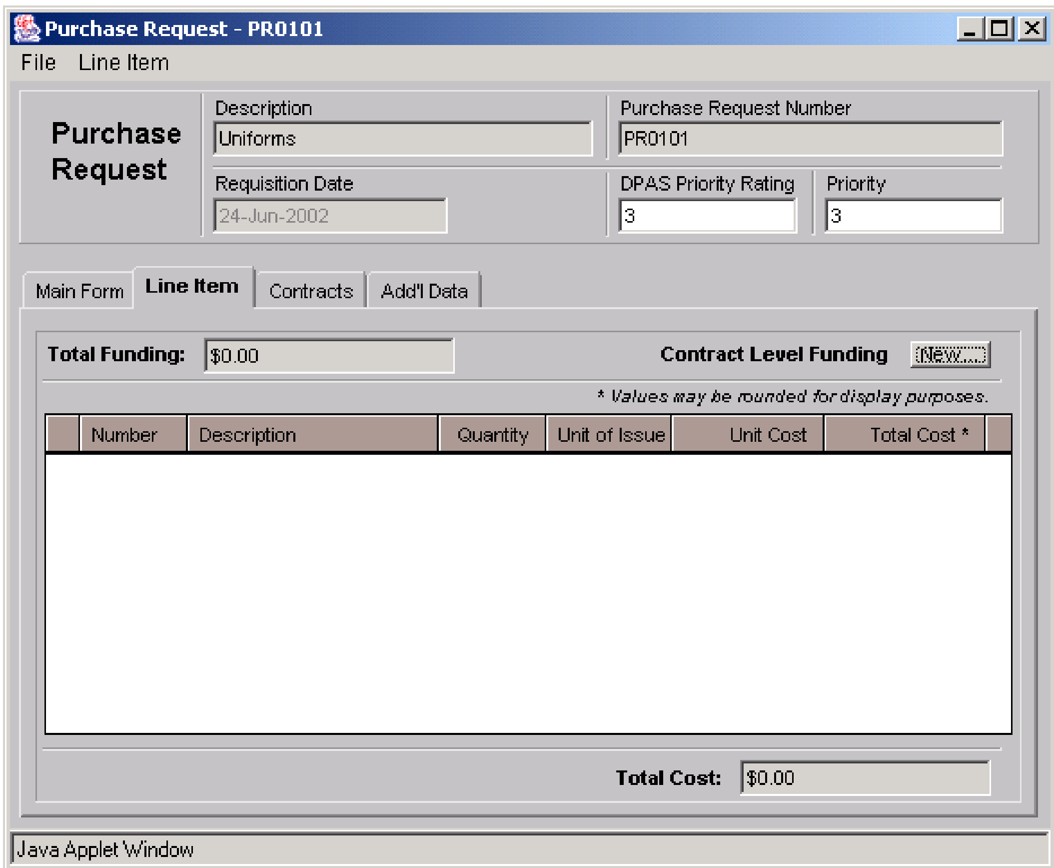

Figure 54: Purchase Request - <Purchase Request Number> – Line Item Tab

Creating a New Funding Source

PRweb users can create funding sources at the contract level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only or not available.

1. Click the [**New**] button next to **Contract Level Funding**.

   *The **Contract Level Funding** window opens.*

Note: If associated funding information is already in the database, the [**More**] button displays and the funding information displays in the table.

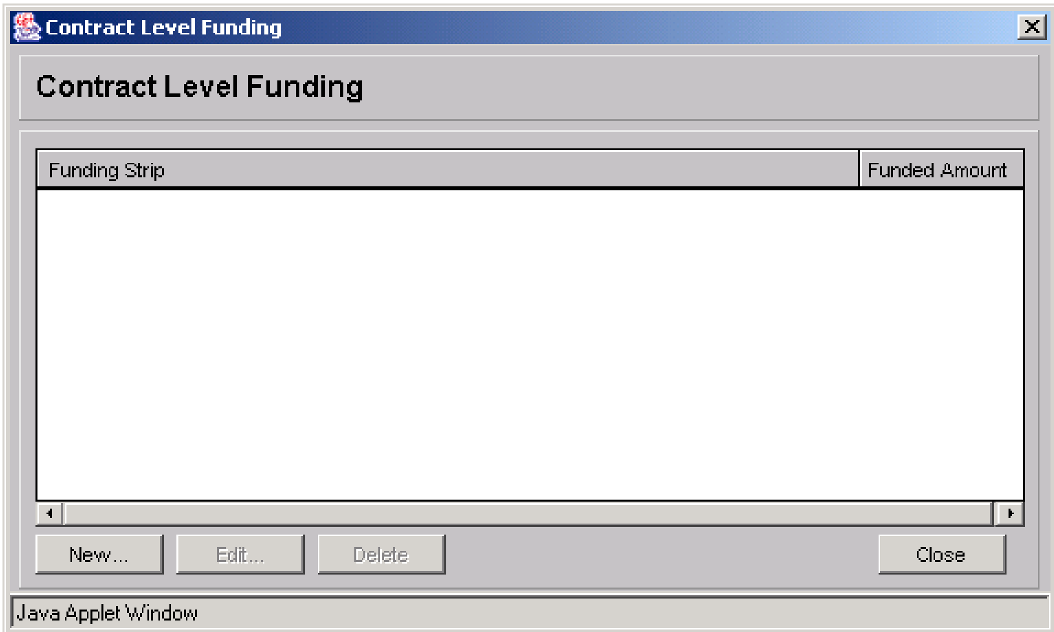

Figure 55: Contract Level Funding Window

2. Click the [**New**] button to add funding information.

*The **Funding Sources - New** window opens with the funding header displayed at the top.*

The funding header includes the **Document Number** and the **Total Estimated Cost** of all line items.

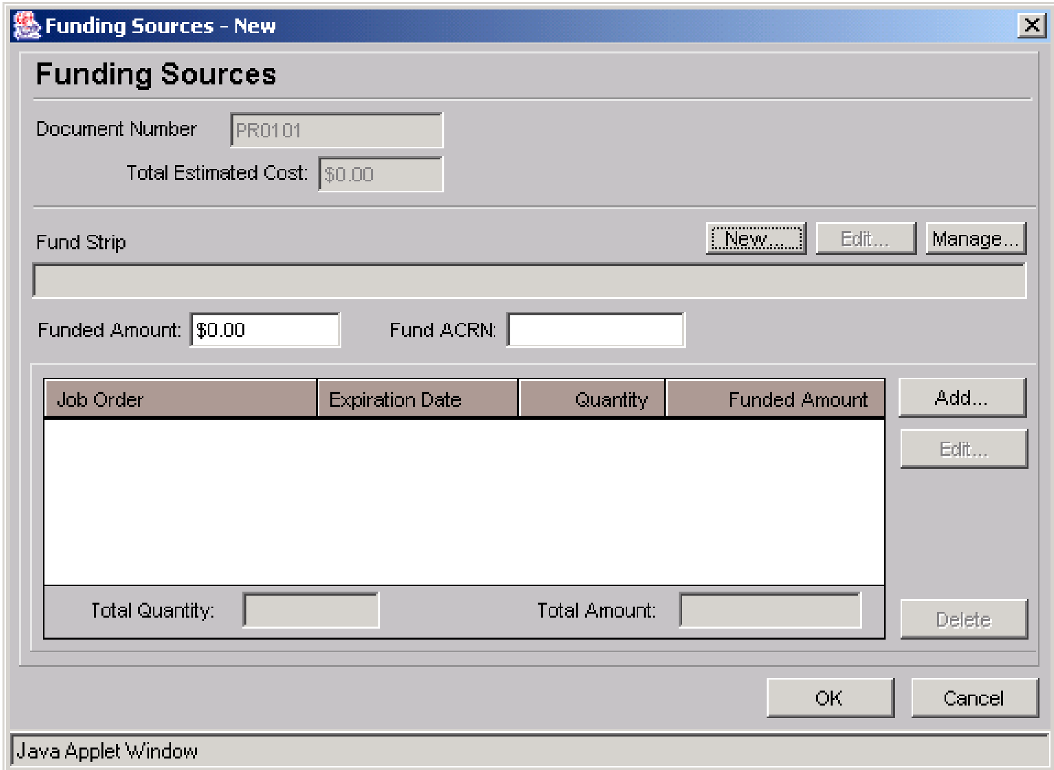

Figure 56: Funding Sources – New Window

3. To search for an existing funding strip, click the [**Manage**] button.

*The **Funding Strip Search** window opens.*

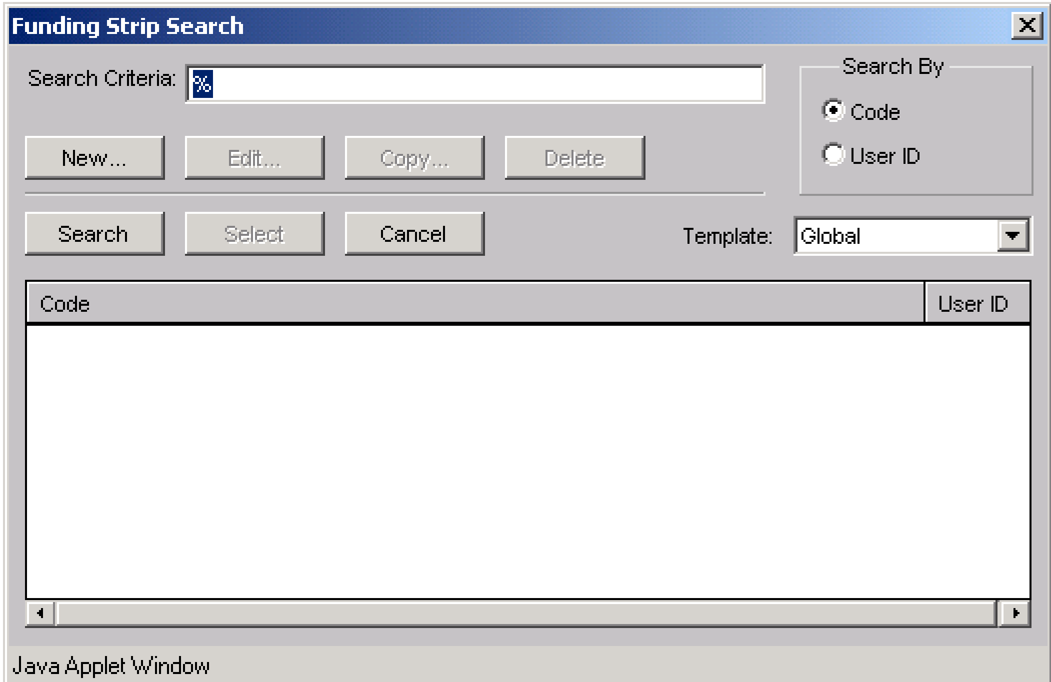

Figure 57: Funding Strip Search Window

4. Select the appropriate template from the **Template** drop-down list box.

Note: Selecting "Global" in the **Template** drop-down list box searches across all templates.

---

5. Enter **Search Criteria.**
6. Click the [**Search**] button.

The search results display.

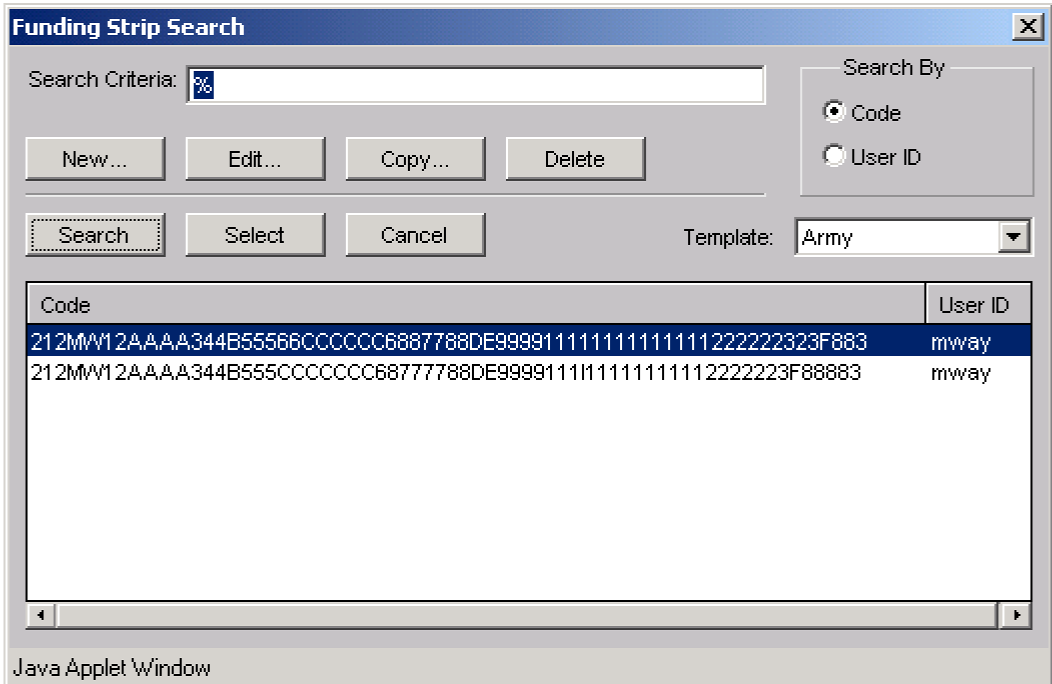

Figure 58: Funding Strip Search Window

Note: Only funding strips that have been created by the user or released by the PD^2 System Administrator are displayed.

---

7. If the desired funding strip is not found skip to step 10. If it is found, continue with step 8.

8. Highlight the desired funding strip and click the [**Select**] button.

9. Skip to step 14.

Note: For more information on searches, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

---

10. If the funding strip is not found, click the [**New**] button.

*The **<Default Template> Funding Strip – New** window opens.*

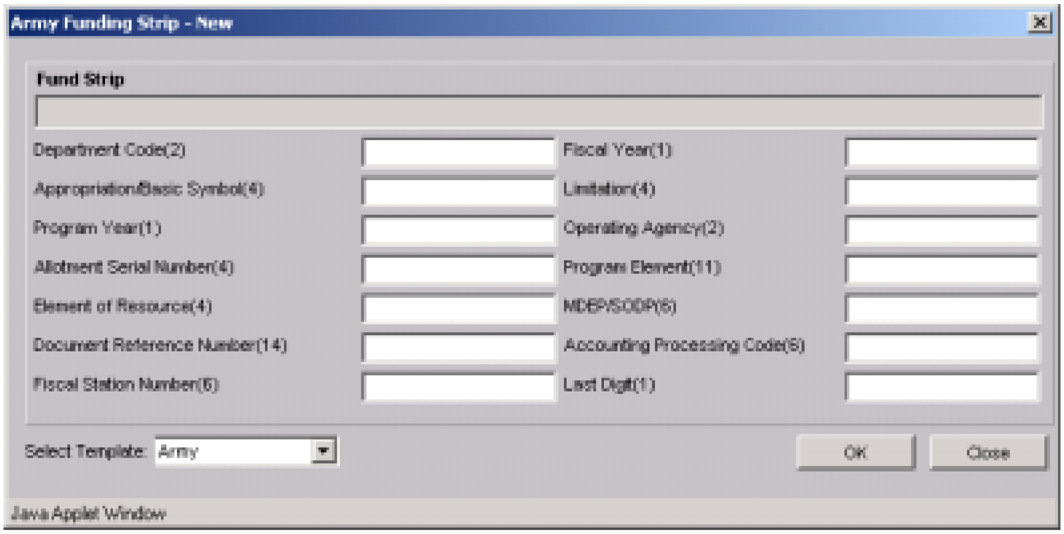

Figure 59: Army Funding Strip – New Window

Note: The default funding strip template set by the System Administrator displays. If the System Administrator has not selected a default template, you cannot continue

11. To change to an alternate template, select another template from the **Select Template** drop-down list box.

12. Enter the funding strip information in the appropriate fields.

Note: Each field must either be filled out completely or left blank.

13. Click [**OK**].

    *The funding strip displays on the list of available funding strips in the **Funding Strip Search** window.*

14. Highlight the new funding strip and click the [**Select**] button to select the new funding strip.

15. Enter the appropriate fund amount in the **Funded Amount** field.

    The **Funded Amount** field allows the *PRweb* user to enter the desired dollar amount to correspond with the selected funding strip. (It is not required to enter a dollar sign.)

Note: The **Funded Amount** defaults to the total cost of all line items.

16. Enter an Accounting Classification Reference Number (ACRN) in the **Fund ACRN**.

    The **Fund ACRN** field allows users to enter ACRN information in the **Funding Source** window. This field holds up to two characters.

17. Click [**OK**] to return to the **Contract Level Funding** window.
18. Click [**Close**] to return to the **Purchase Request** window.
19. From the menu, select **File** → **Save** to update the funding information and save the PR.

Editing a Funding Source

PRweb users can edit funding sources at the contract level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only.

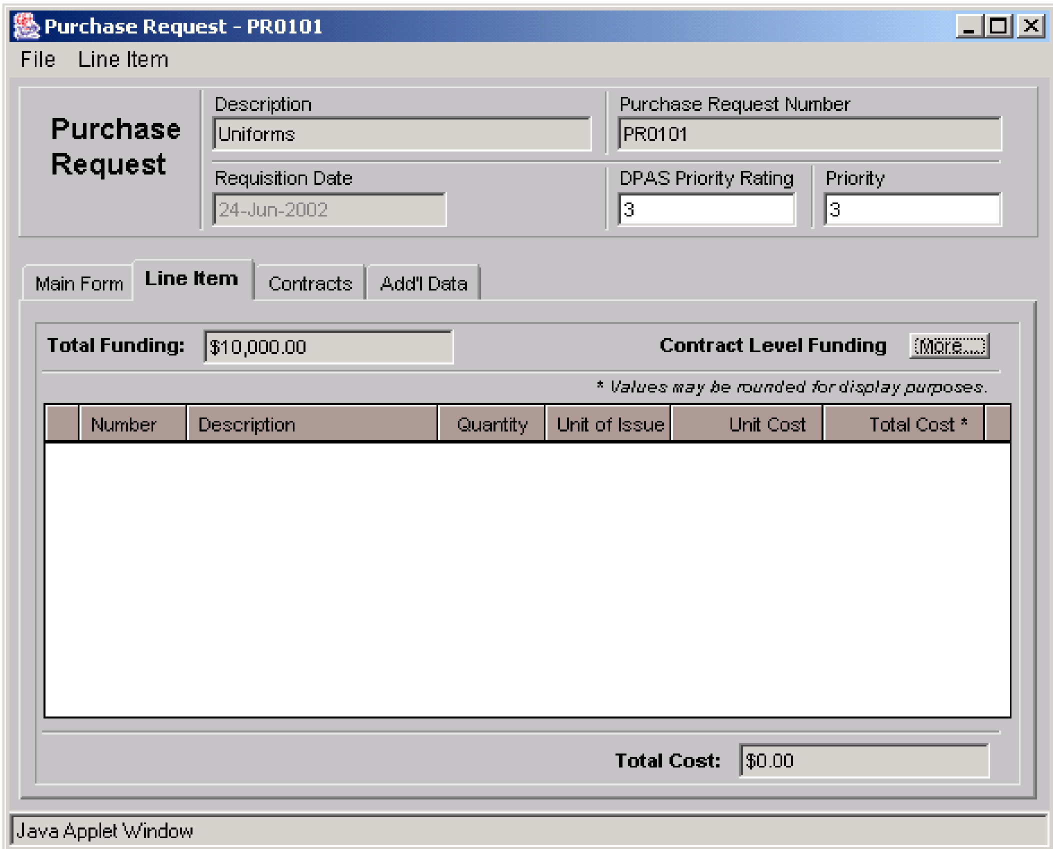

Figure 60: Purchase Request - <Purchase Request Number> - Line Item Tab

1. From the *Line Item* Tab of the **Purchase Request** window, click the [**More**] button next to **Contract Level Funding**.

   *The **Contract Level Funding** window opens.*

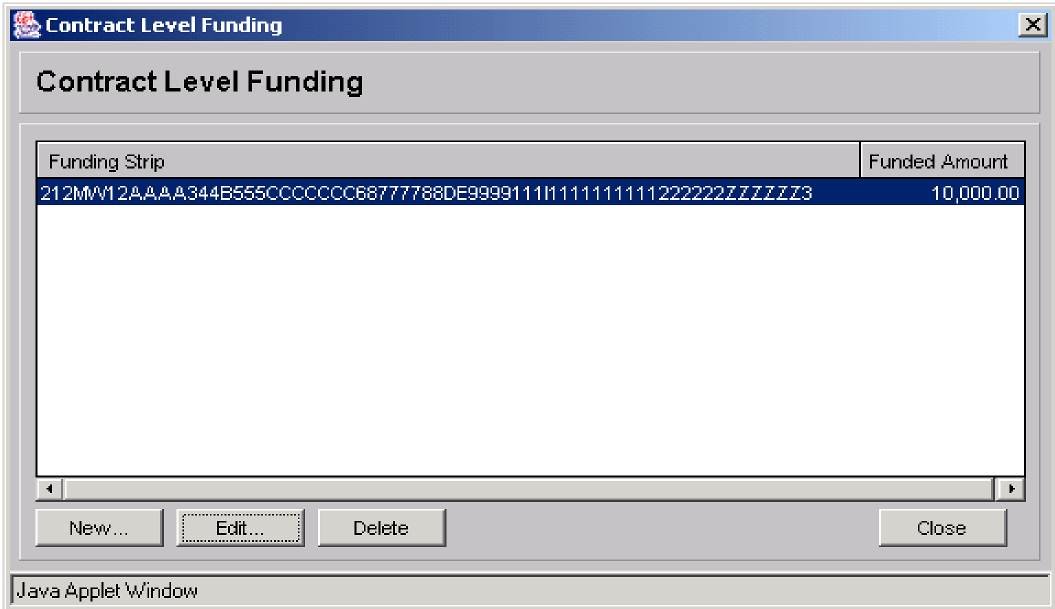

Figure 61: Contract Level Funding Window

2. Highlight the funding source to be edited and click the [**Edit**] button.

   *The **Funding Sources** window opens.*

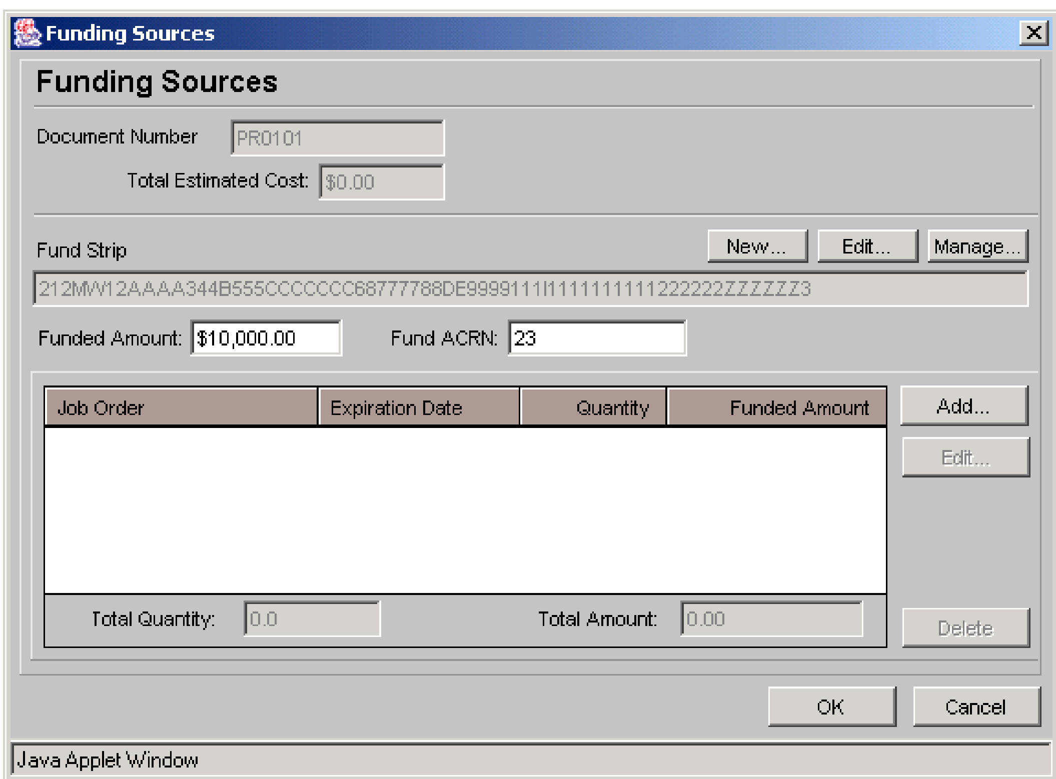

Figure 62: Funding Sources Window

3. Make desired changes and click [**OK**] to return to the **Contract Level Funding** window.

4. Click [**Close**] to return to the **Purchase Request** window.

5. From the menu, select **File → Save** to update the funding information and save the PR.

Deleting a Funding Source

PRweb users can delete funding sources at the contract level. Deleting a funding source removes it from the PR. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only.

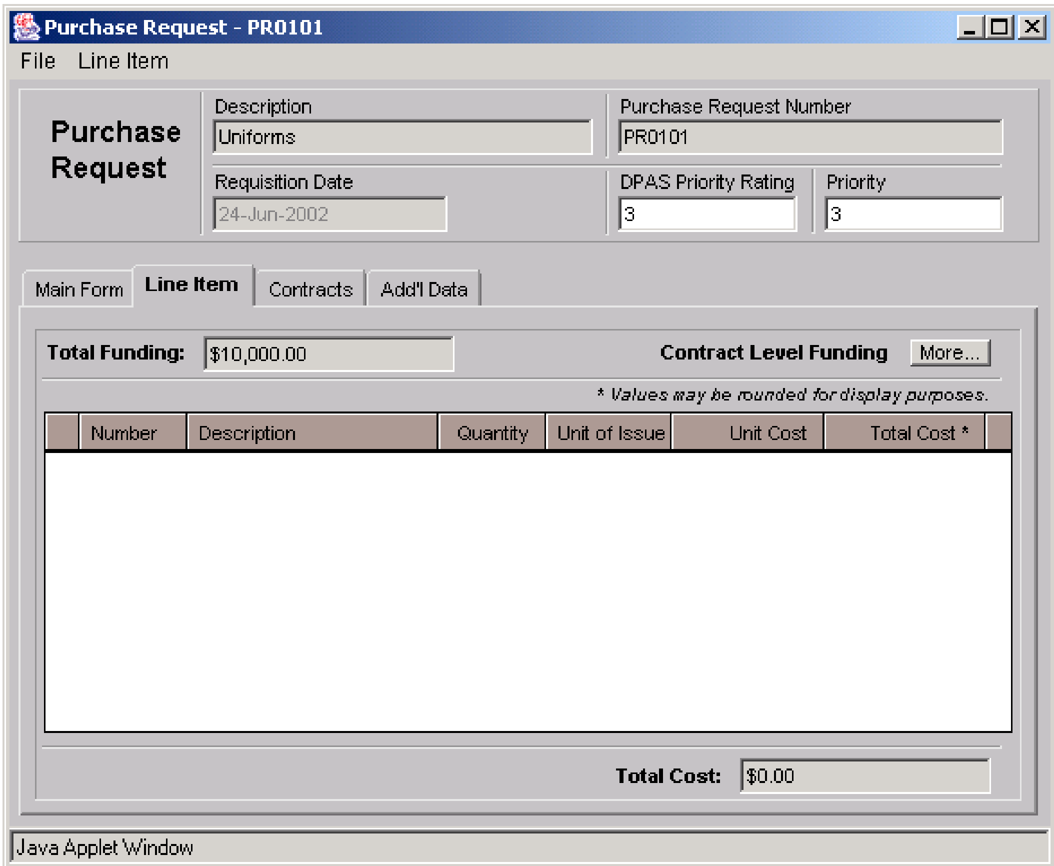

Figure 63: Purchase Request - <Purchase Request Number> – Line Item Tab

1. From the *Line Item* tab of the **Purchase Request** window, click the [**More**] button next to **Contract Level Funding**.

   *The **Contract Level Funding** window opens.*

2. Highlight the funding source to be deleted and click the [**Delete**] button.

3. Click the [**Yes**] button in the **Confirmation** window.

   *The **Contract Level Funding** window displays with the funding source deleted from the table.*

4. Click the [**Close**] button to return to the **Purchase Request** window.

5. From the menu, select **File → Save** to update the funding information and save the PR.

Creating a New Funding Strip

PRweb users can create funding strips at the contract level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only.

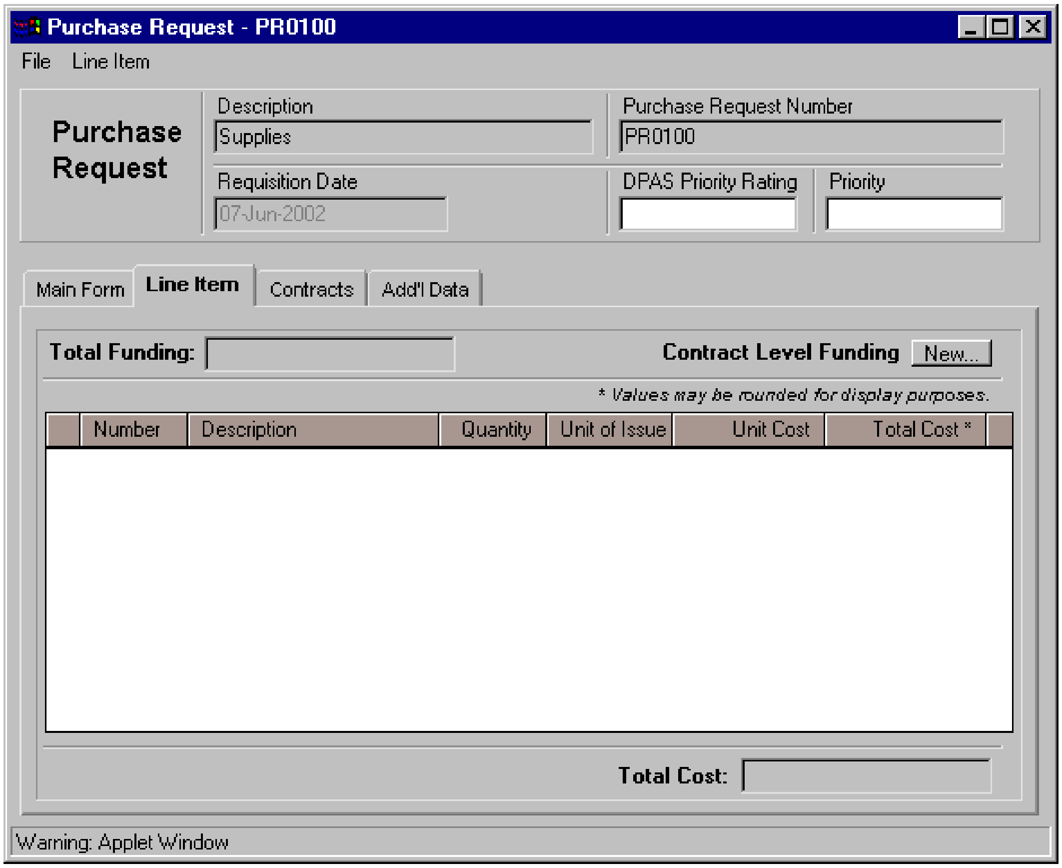

Figure 64: Purchase Request - <Purchase Request Number> - Line Item Tab

1. Click the [**New**] button next to **Contract Level Funding**.

*The **Contract Level Funding** window opens.*

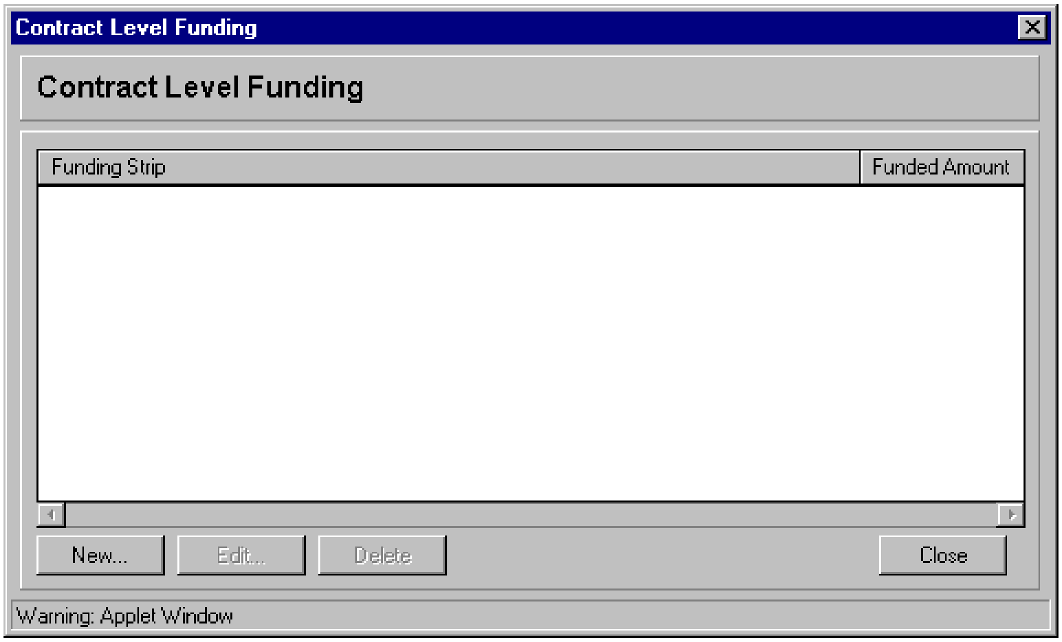

Figure 65: Contract Level Funding Window

2. Click the [**New**] button.

   *The **Funding Sources – New** window opens.*

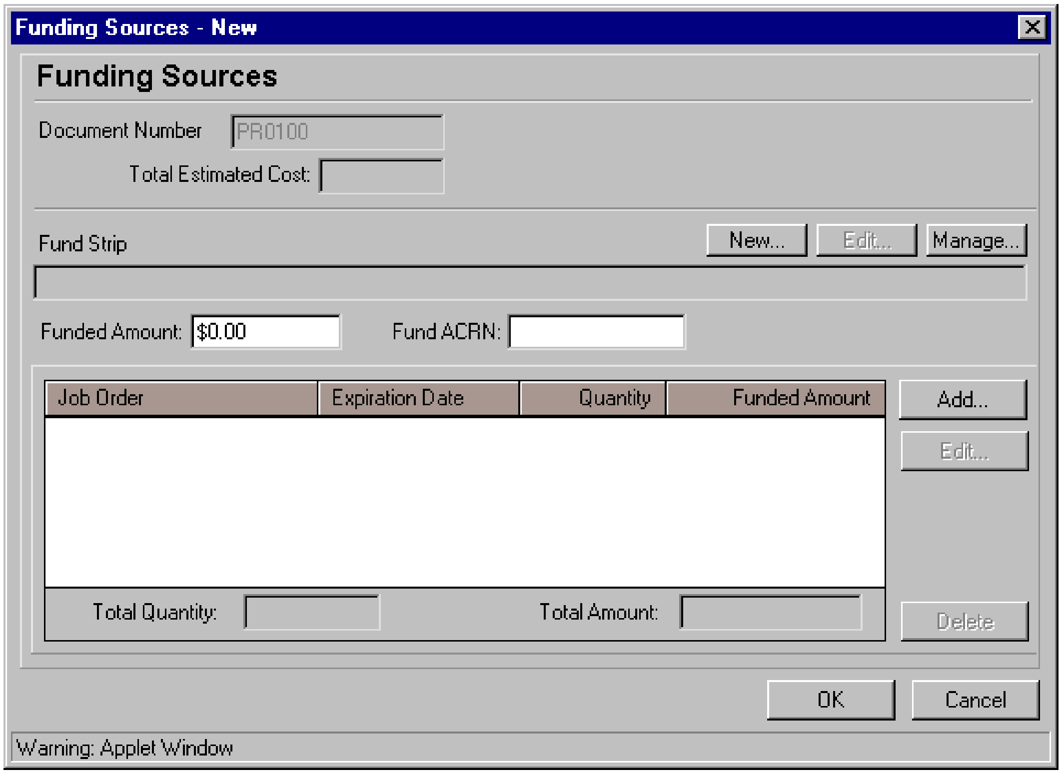

Figure 66: Funding Sources – New Window

3. Click the [**New**] button.

   *The <**Default Template**> **Funding Strip - New** window opens.*

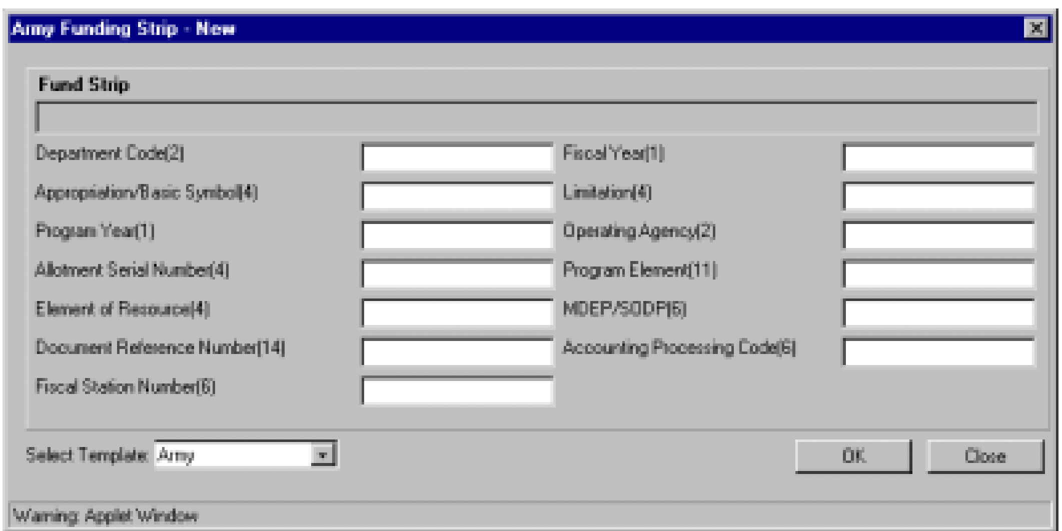

Figure 67: Army Funding Strip – New Window

4. To change an alternate template, select another template from the **Select Template** drop-down list box.

5. Enter the funding strip information in the appropriate fields.

Note: Each field must either be filled out completely or left blank. However some fields may be required, depending on how the System Administrator configured the funding template.

6. Click [**OK**].

   The funding strip displays in the ***Fund Strip*** *field of the* ***Funding Sources - New*** *window.*

7. Click [**OK**] to return to the **Contract Level Funding** window.

8. Click [**Close**] to return to the **Purchase Request** window.

9. From the menu, select **File → Save** to update the funding information and save the PR.

Note: A new funding strip may also be created from the **Funding Strip Search** window by clicking the [**New**] button.

Copying a Funding Strip

PRweb users can copy funding strips at the contract level. Copying funding strips may save time in the creation of new funding strips. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only.

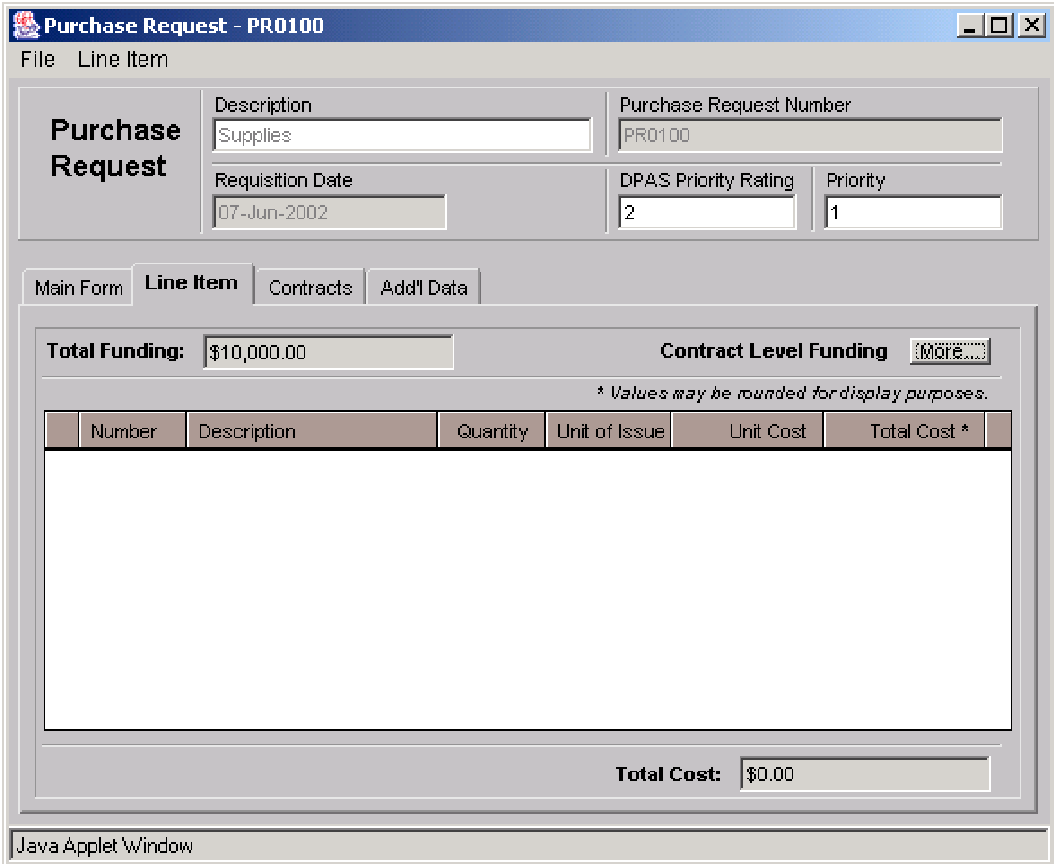

Figure 68: Purchase Request - <Purchase Request Number> - Line Item Tab

1. Click the [**More**] button next to **Contract Level Funding**.

*The **Contract Level Funding** window opens.*

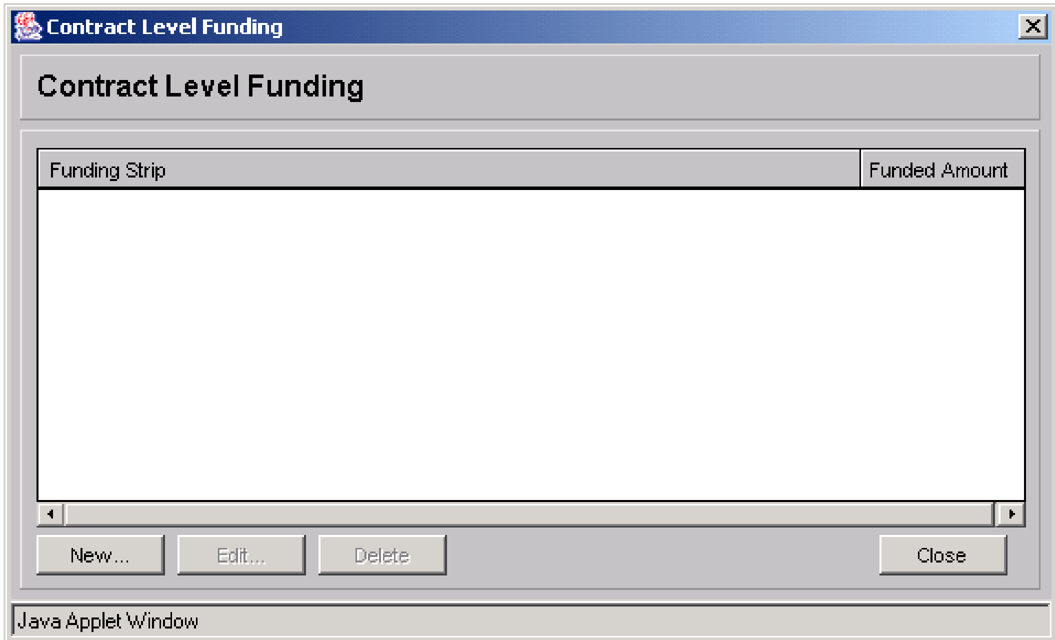

Figure 69: Contract Level Funding Window

2. Click the [**New**] button.

*The **Funding Sources – New** window opens.*

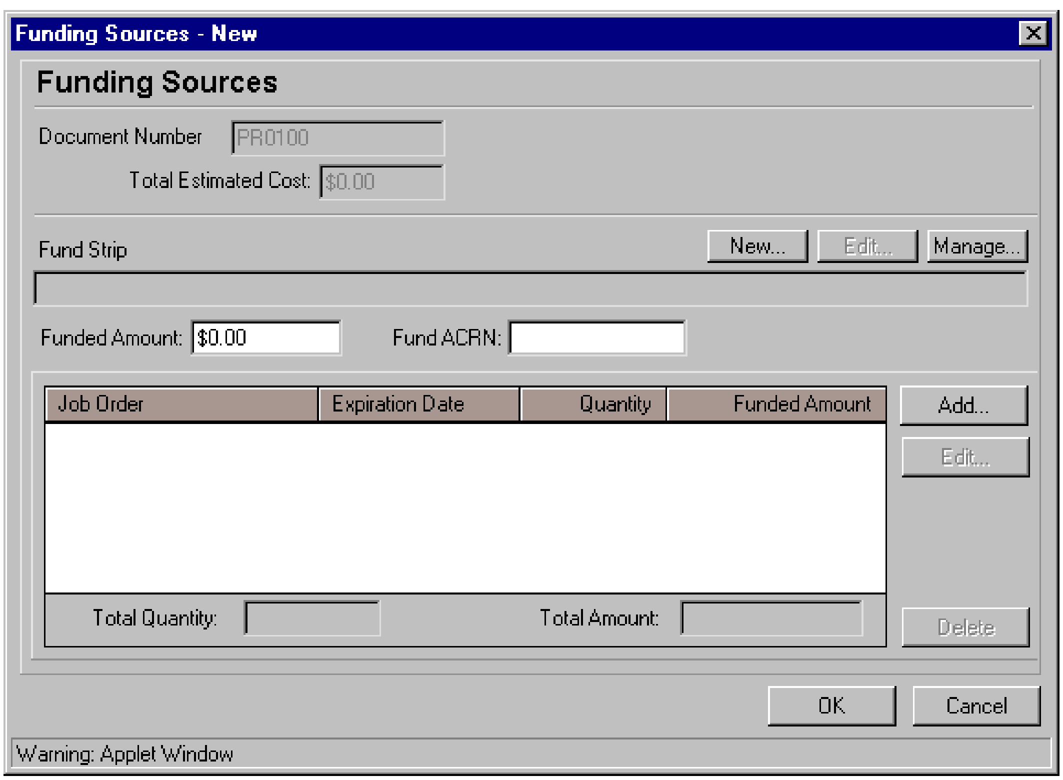

Figure 70: Funding Sources – New Window

3. Click the [**Manage**] button.

   *The **Funding Strip Search** window opens.*

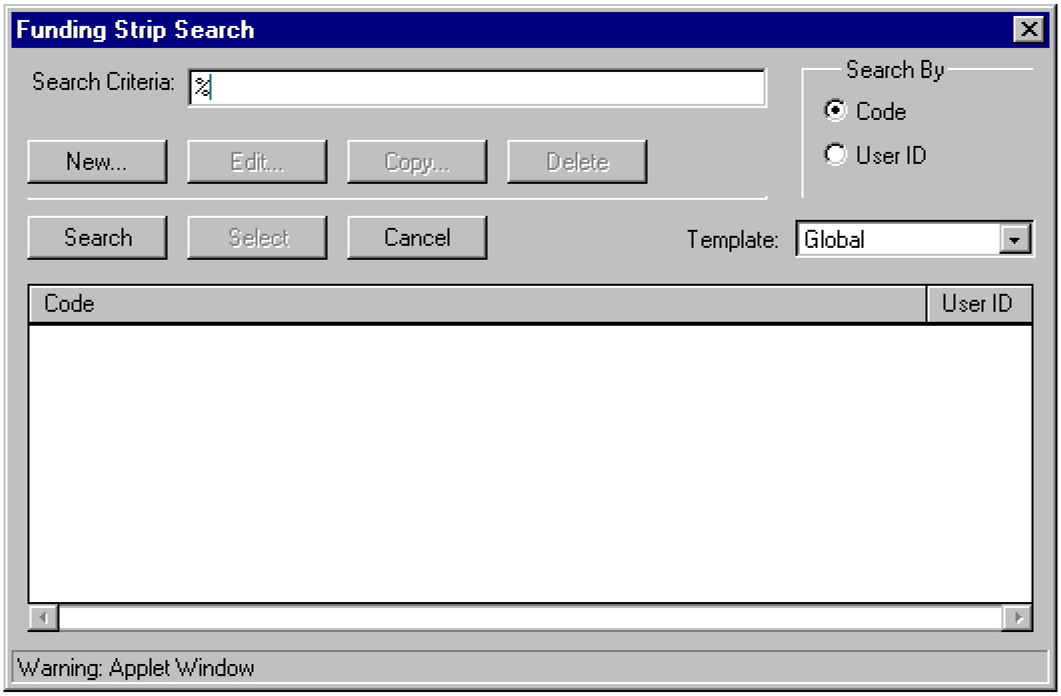

Figure 71: Funding Strip Search Window

4. Select the appropriate template from the **Template** drop-down list box.

5. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information regarding searches, refer to the "Search Function" section in *Chapter 2: PRweb Desktop*.

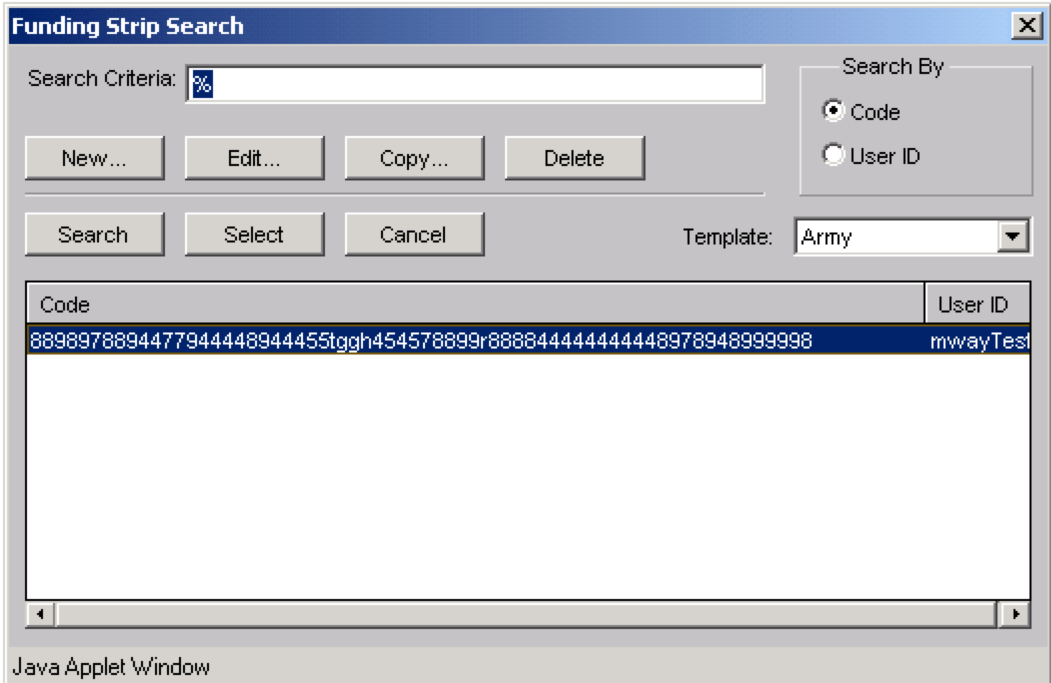

Figure 72: Funding Strip Search Window

6. Highlight the desired funding strip and click the [**Copy**] button.

   The ***<Default Template> Funding Strip - Copy*** *window opens with the copied funding strip information in each field.*

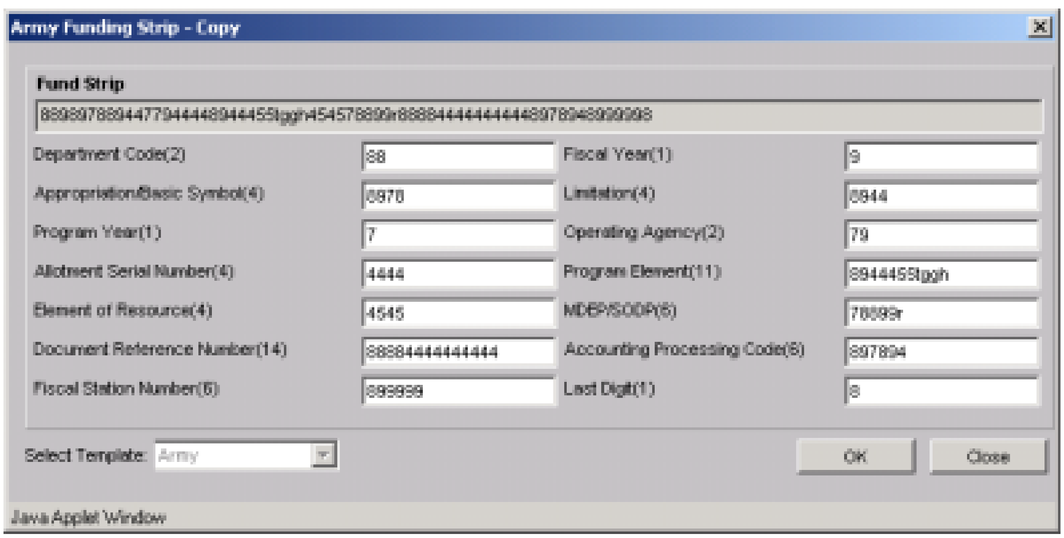

Figure 73: Army Funding Strip – Copy Window

Note: The funding strip is copied into the template that corresponds with the *PRweb* template used to create the original funding strip. If the funding strip was created with a *PRweb* template that has either been disabled or updated, the *PRweb* user is unable to copy the funding strip. In addition, funding strips that were created in PD[2] will display as Miscellaneous.

7. Make the desired changes to the funding strip.
8. Click [**OK**] to save the changes and return to the **Funding Strip Search** window.

   *The new funding strip displays in the **Funding Strip Search** window.*

9. Highlight the funding strip and click the [**Select**] button to select the new funding strip.
10. Click [**OK**] to return to the **Contract Level Funding** window.
11. Click [**Close**] to return to the **Purchase Request** window.
12. From the menu, select **File → Save** to update the funding information and save the PR.

Editing a Funding Strip

PRweb users have two options for editing funding strips at the contract level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only.

If the System Administrator has updated or removed the template from which the selected funding strip was created from, *PRweb* alerts the user that the template has changed.

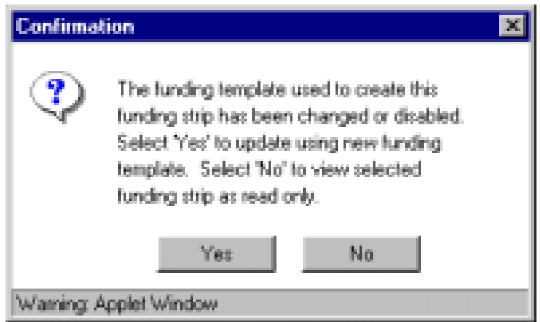

Figure 74: Confirmation Window

If the user selects [**Yes**], *PRweb* displays the updated version of the template or the default template, depending on whether the template was disabled. The user is able to select another template if desired from the **Select Template** dropdown list box.

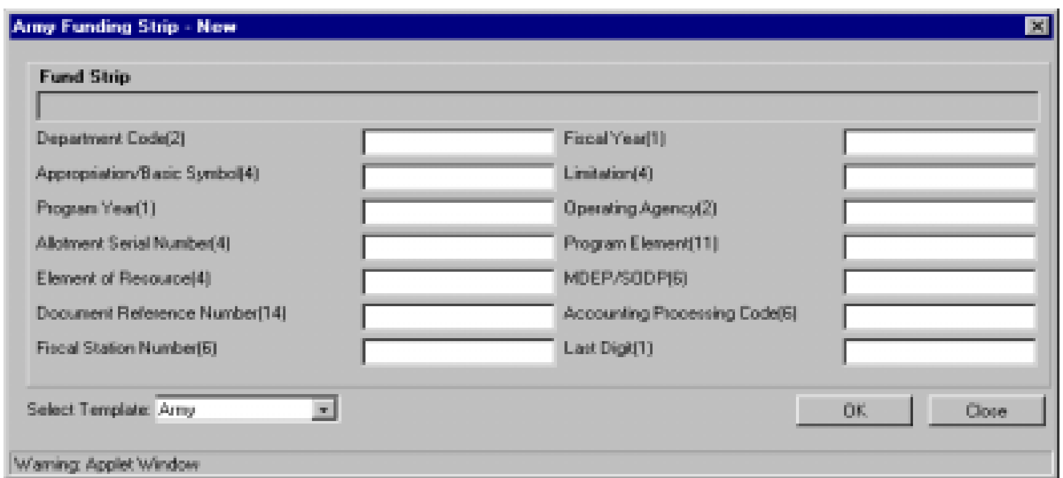

Figure 75: Army Funding Strip – New Window

If the user selects [**No**], the funding strip displays as read-only.

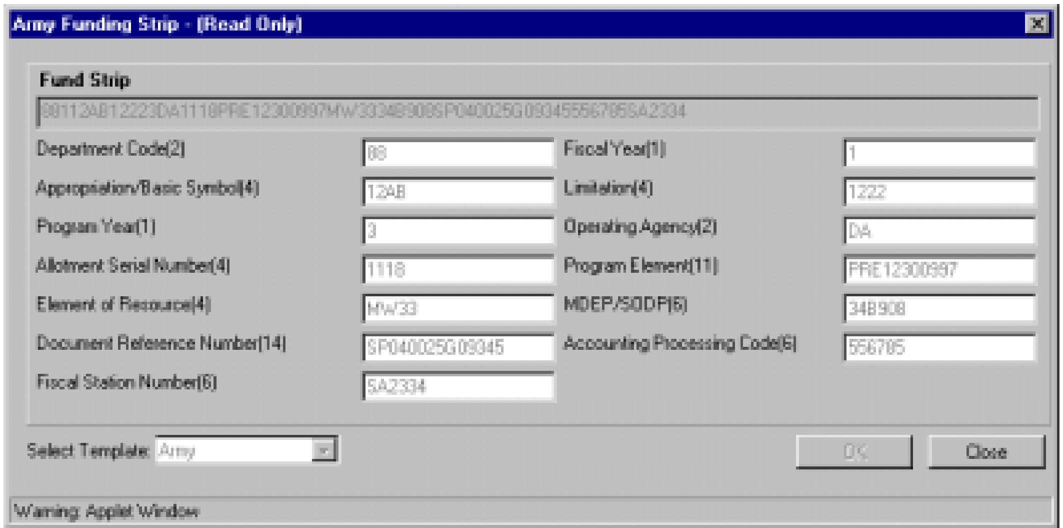

Figure 76: Army Funding Strip – (Read Only) Window

Option 1: By Funding Strip Search

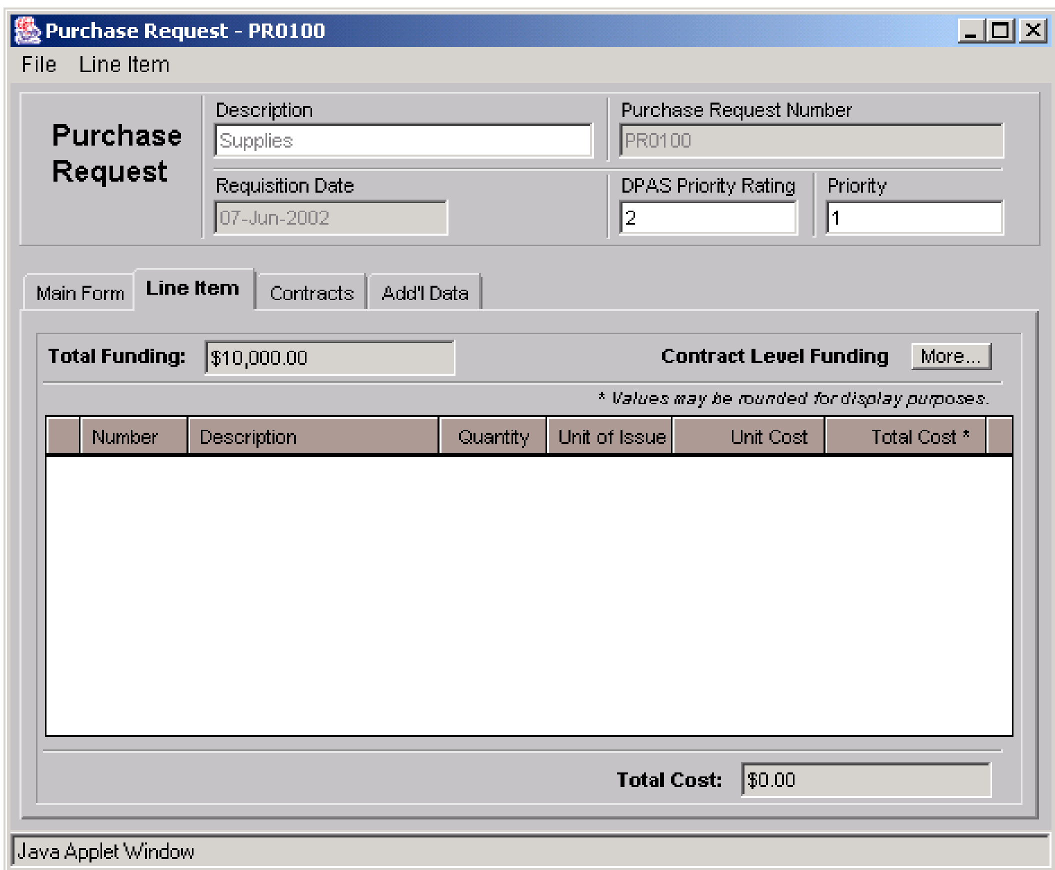

Figure 77: Purchase Request - <Purchase Request Number> - Line Item Tab

1. Click the [**More**] button next to **Contract Level Funding**.

   *The **Contract Level Funding** window opens.*

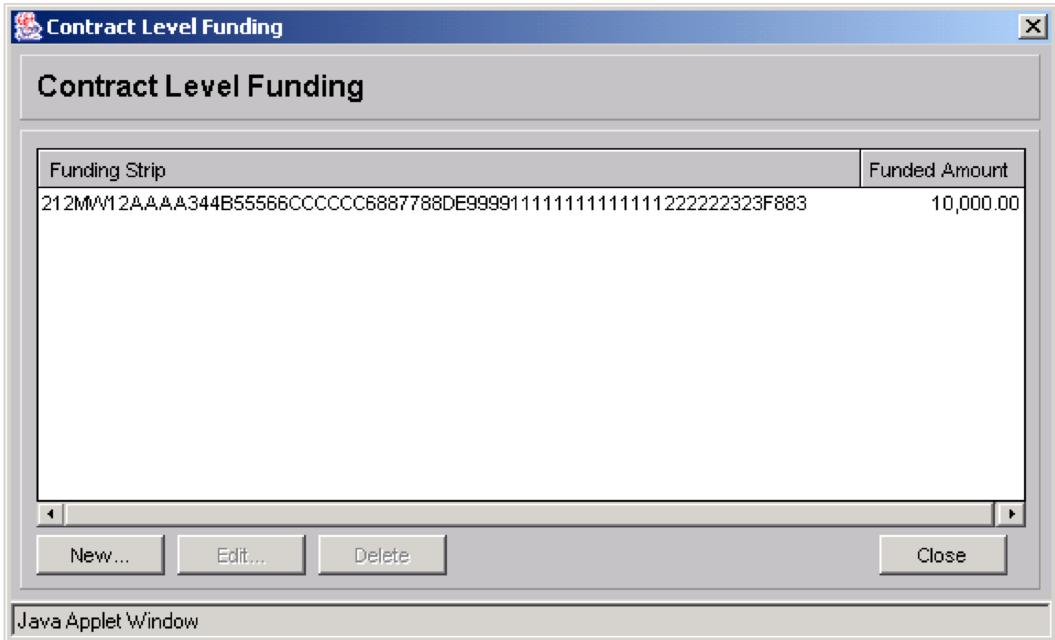

Figure 78: Contract Level Funding Window

2. Highlight the desired funding source and click the [**Edit**] button.

Note: The *PRweb* user can also double-click on the funding source to open the highlighted funding source.

---

*The **Funding Sources** window opens.*

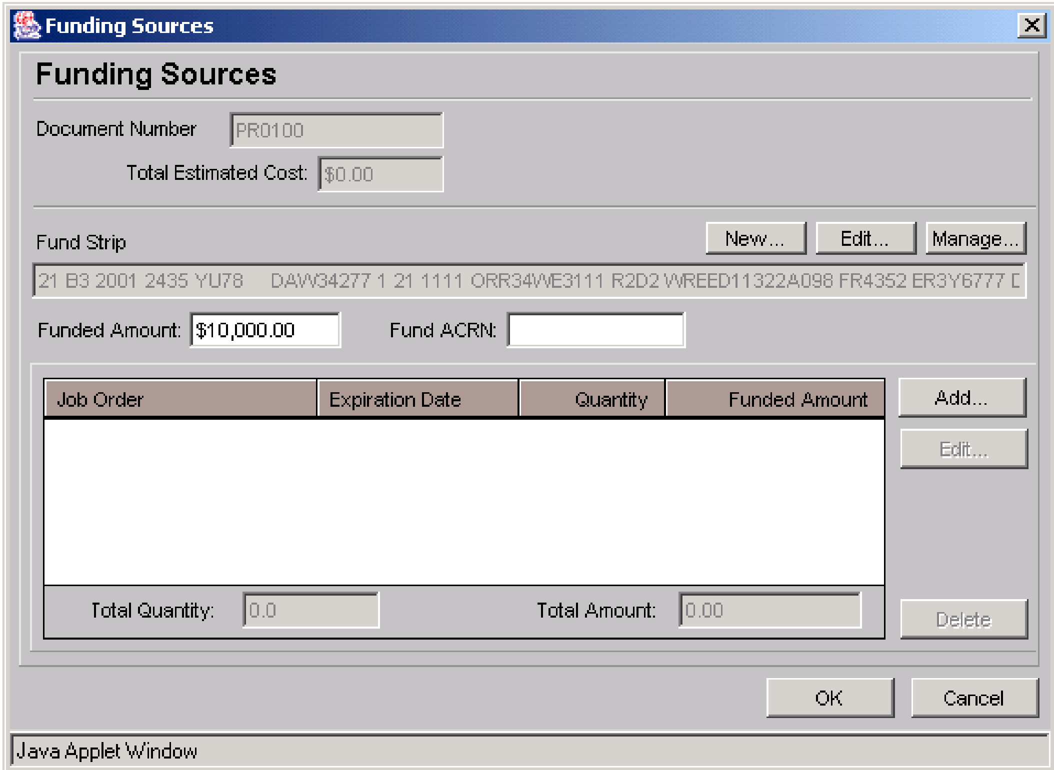

Figure 79: Funding Sources Window

3. Click the [**Manage**] button.

*The **Funding Strip Search** window opens.*

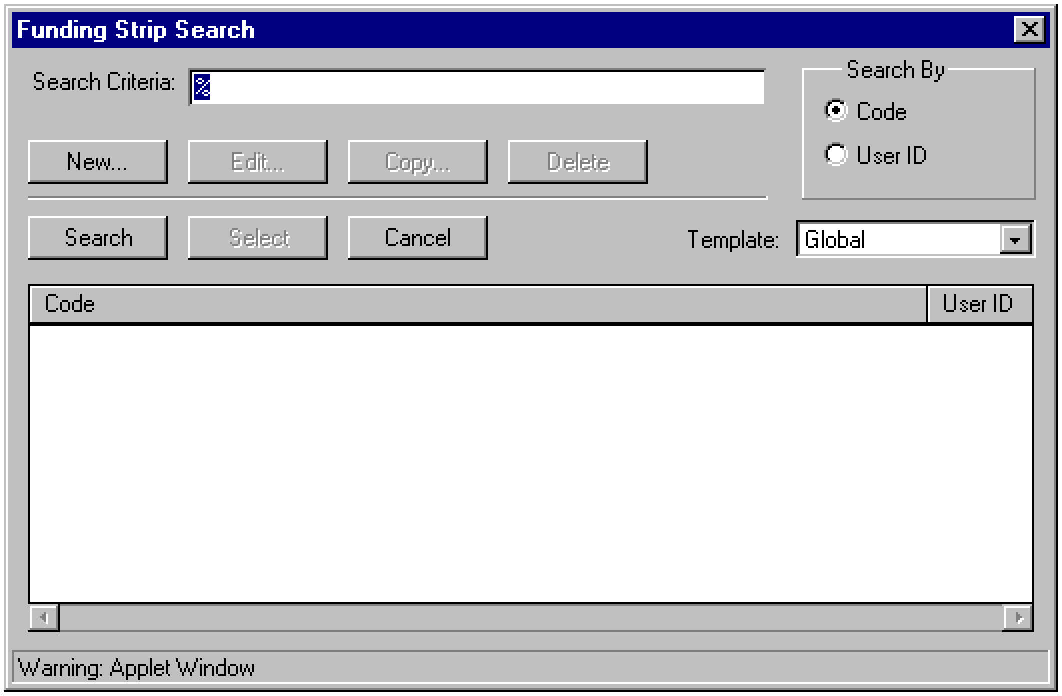

Figure 80: Army Funding Strip – Edit Window

4. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information regarding searches, refer to the 'Search Function" section in *Chapter 2: PRweb Desktop*.

5. Highlight the desired funding strip and click the [**Edit**] button.

*The **Army Funding Strip – Edit** window opens with the original funding information displayed.*

Note: You may not edit a funding strip that is applied to either another PR or another funding source on the same PR.

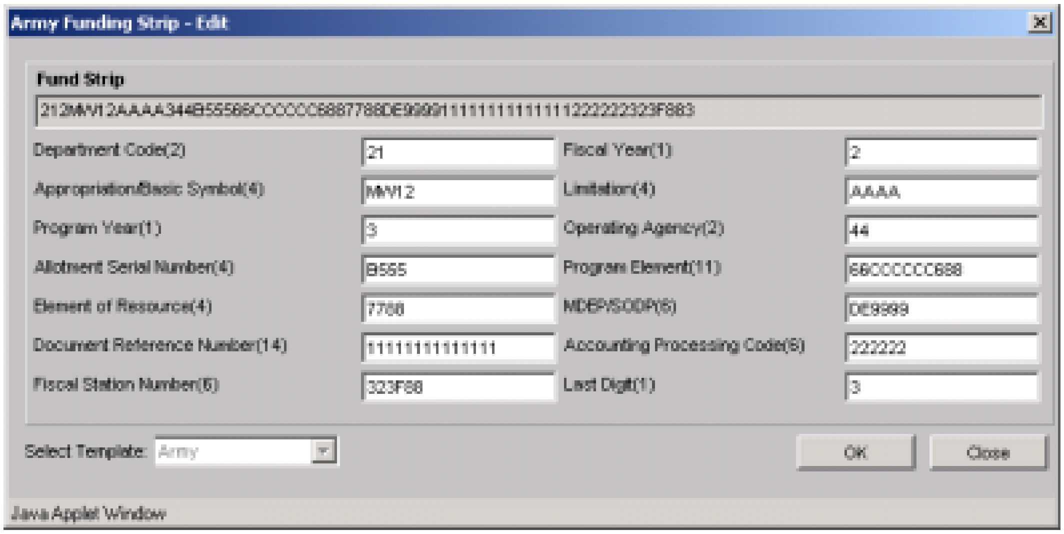

Figure 81: Army Funding Strip – Edit Window

6. Make desired changes to the funding strip and click [**OK**] to return to the **Funding Strip Search** window.

7. Click the [**Select**] button to select the updated funding strip and return to the **Funding Sources** window.

8. Click [**OK**] to return to the **Contract Level Funding** window.

9. Click the [**Close**] button to return to the **Purchase Request** window.

10. From the menu, select **File → Save** to update the funding information and save the PR.

Option 2: By Funding Sources Window

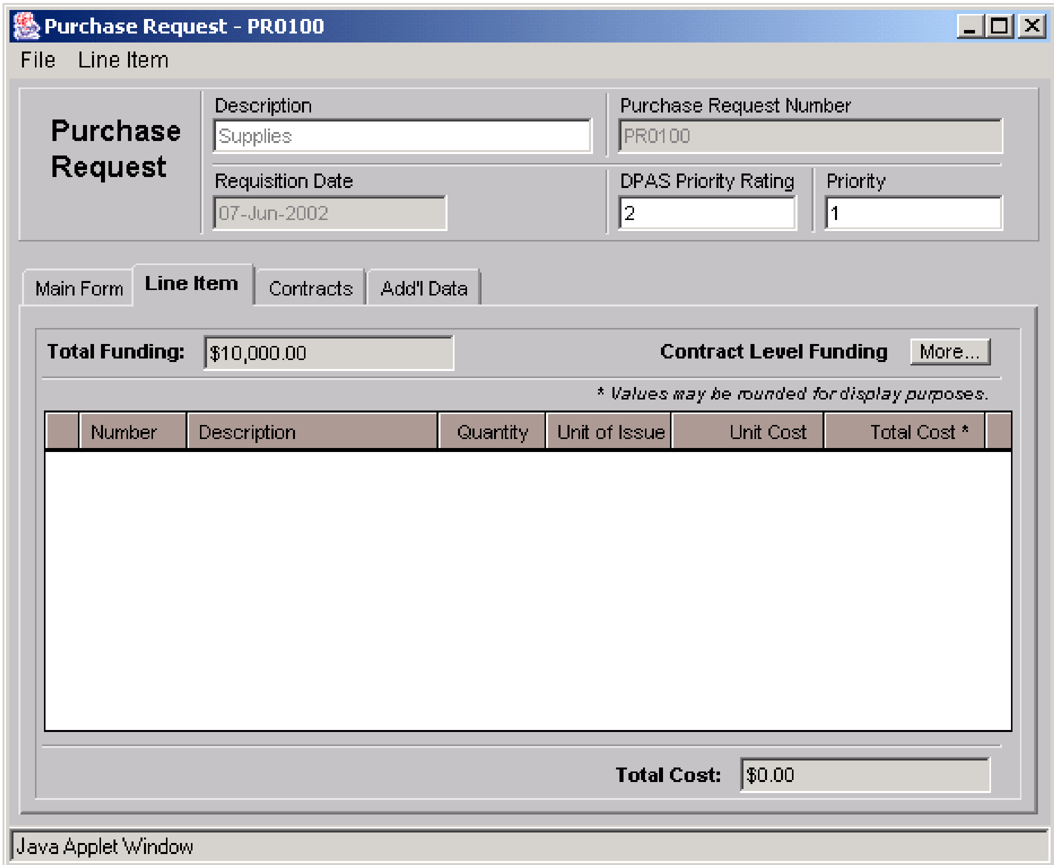

Figure 82: Purchase Request - <Purchase Request Number> - Line Item Tab

1. Click the [**More**] button next to **Contract Level Funding**.

*The **Contract Level Funding** window opens.*

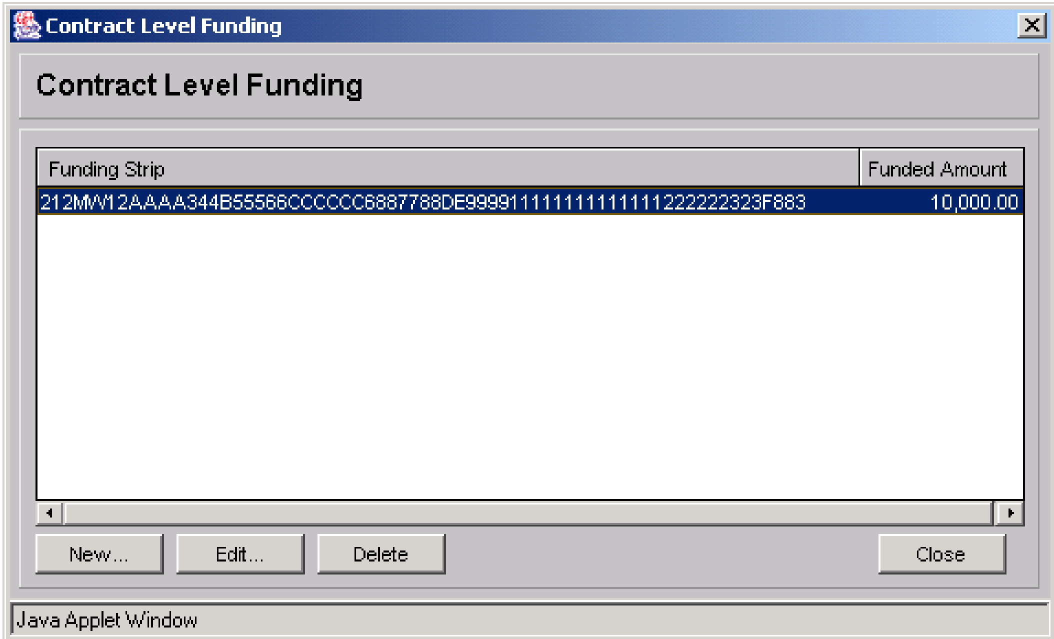

Figure 83: Contract Level Funding Window

2. Highlight the desired funding source and click the [**Edit**] button.

*The **Funding Sources** window opens.*

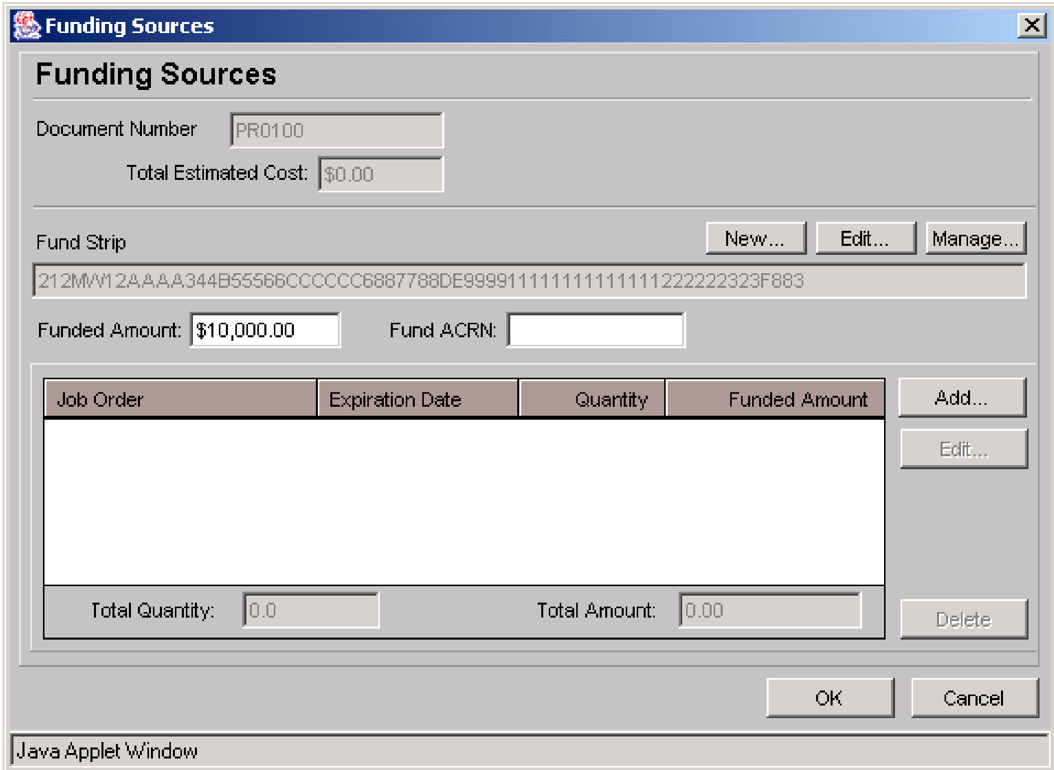

Figure 84: Funding Sources Window

3. From the **Funding Sources** window click the [**Edit**] button next to the **Fund Strip** field.

   *The **Funding Strip – Edit** window opens with the original funding information displayed.*

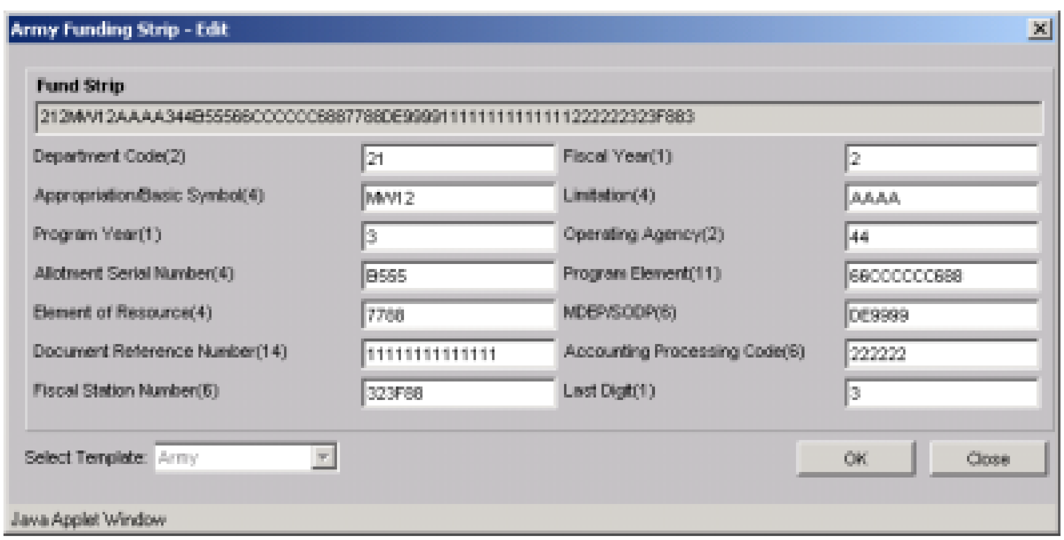

Figure 85: Army Funding Strip – Edit Window

4. Make desired changes to the funding strip and click [**OK**] to return to the **Funding Sources** window.

5. Click [**OK**] to return to the **Contract Level Funding** window.

6. Click the [**Close**] button to return to the **Purchase Request** window.

7. From the menu, select **File→ Save** to update the funding information and save the PR.

Deleting a Funding Strip

PRweb users can delete funding strips at the contract level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only.

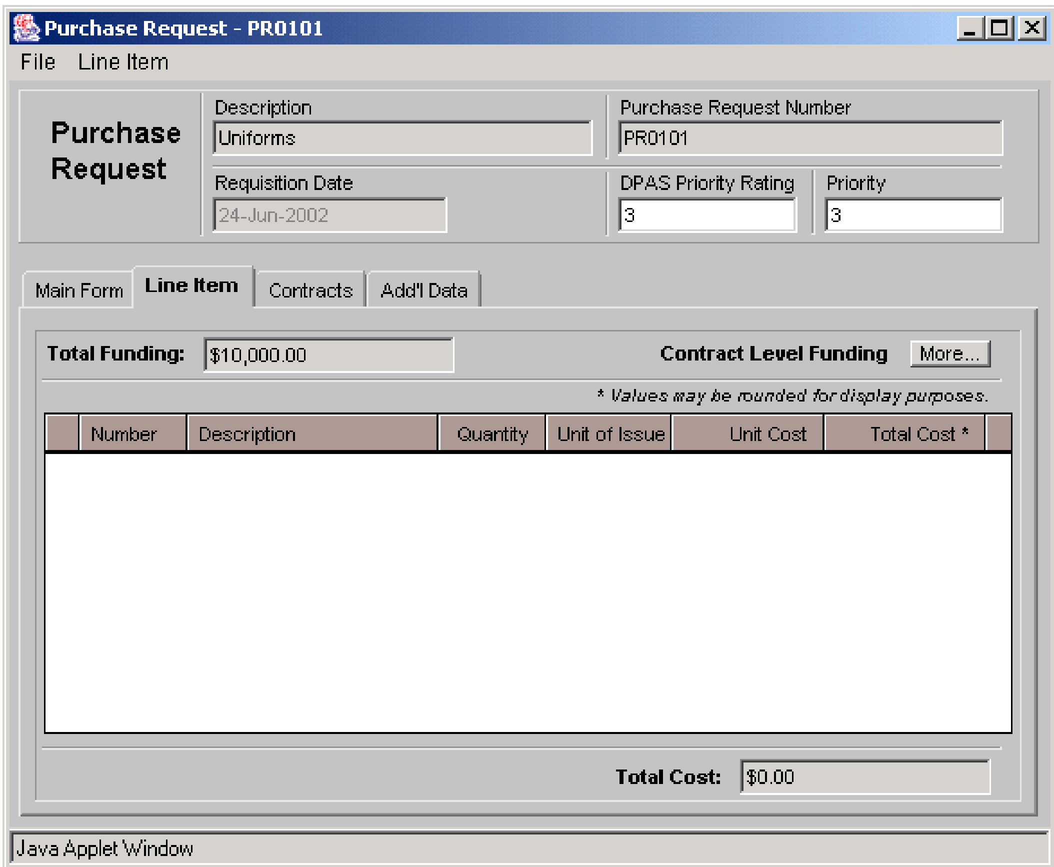

Figure 86: Purchase Request - <Purchase Request Number> Window

1. Click the [**More**] button next to **Contract Level Funding**.

*The **Contract Level Funding** window opens.*

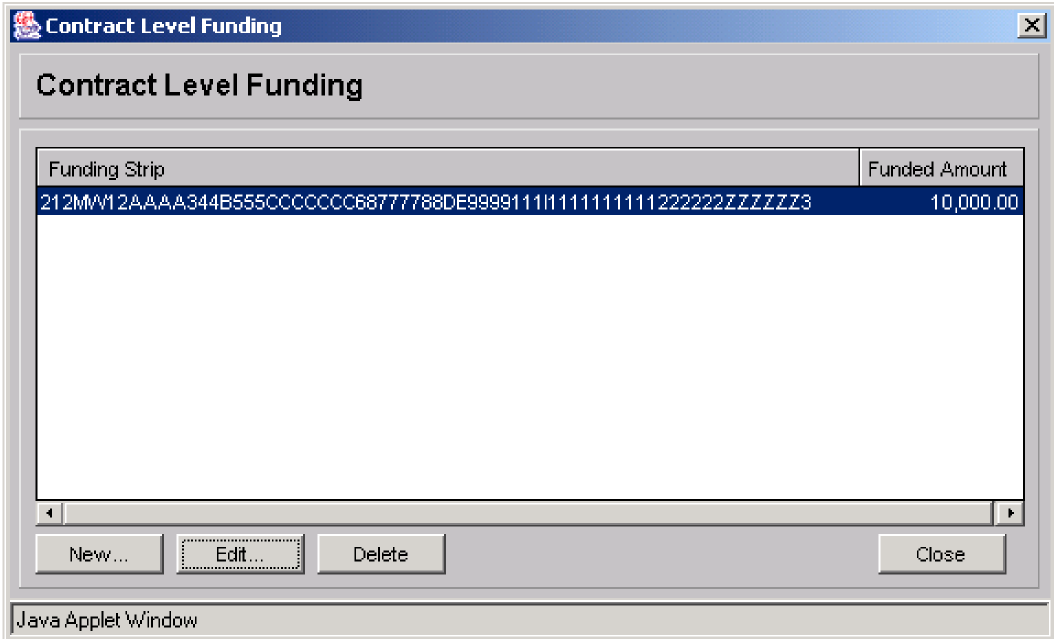

Figure 87: Contract Level Funding Window

2. Highlight the desired funding source and click the [**Edit**] button.

*The **Funding Sources** window opens.*

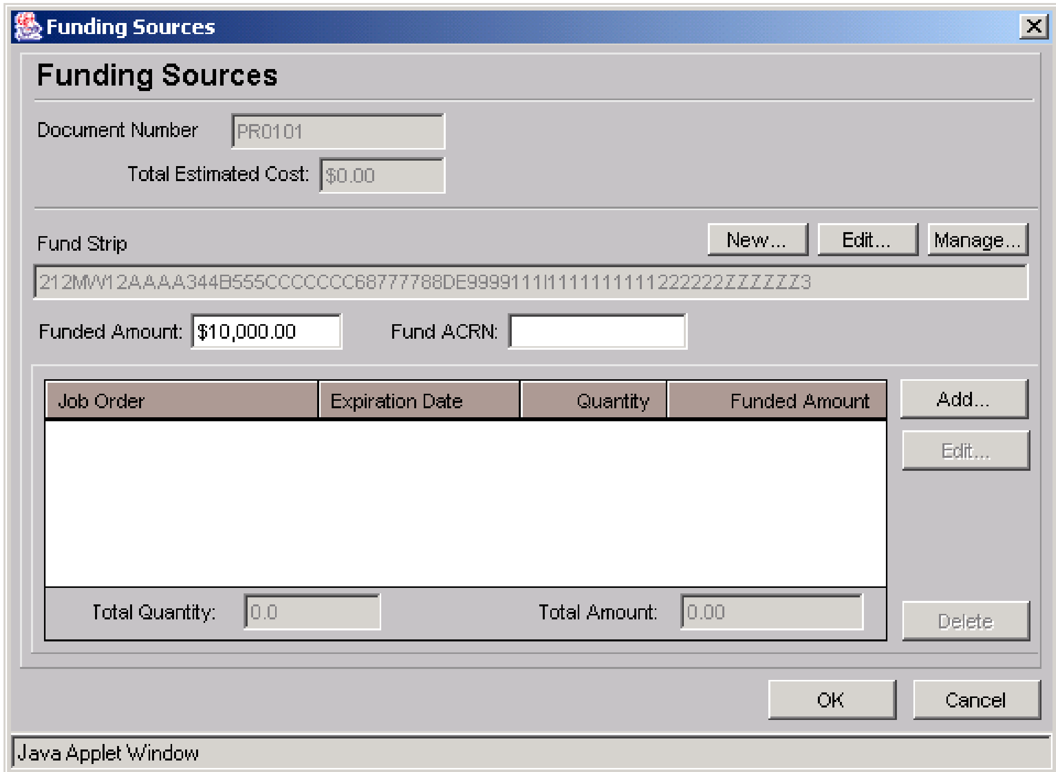

Figure 88: Funding Sources Window

3. Click the [**Manage**] button.

   The Funding Strip Search window opens.

4. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information regarding searches, refer to the "Search Function" section in *Chapter 2: PRweb Desktop*.

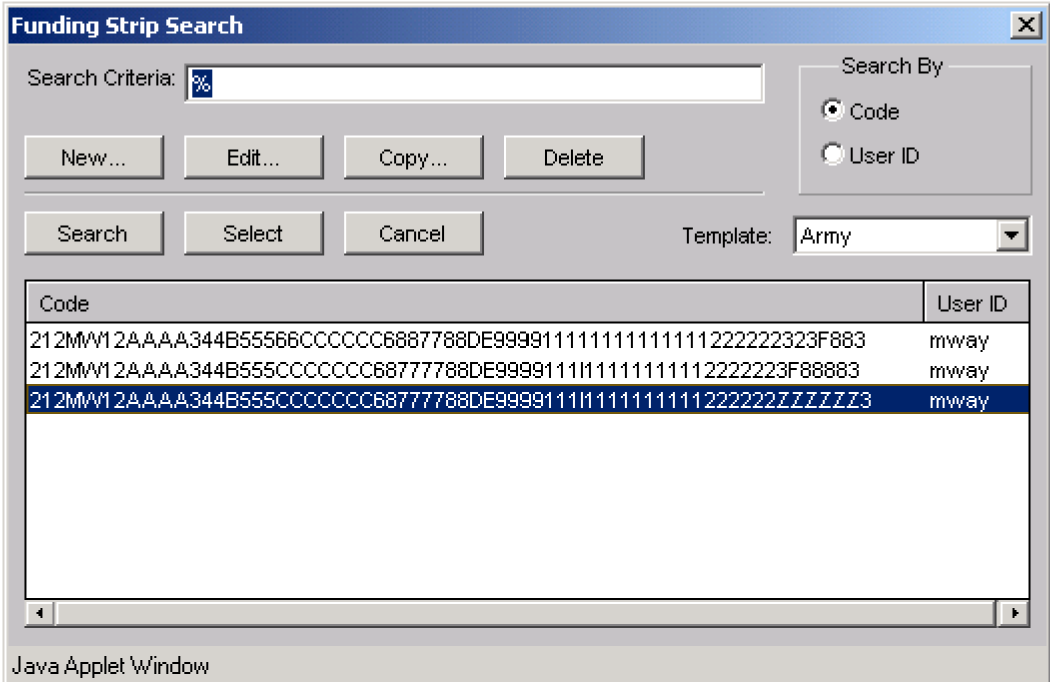

Figure 89: Funding Strip Search Window

5. Highlight the desired funding strip and click the [**Delete**] button.

Note: You may not delete a funding strip that is applied to either another PR or another funding source on the same PR.

---

6. Click the [**Yes**] button in the **Confirmation** window.

   *The **Funding Strip Search** window displays with the funding strip deleted from the table.*

7. Click the [**Cancel**] button to return to the **Funding Sources – New** window.

8. Click [**OK**] to return to the **Contract Level Funding** window.

9. Click the [**Close**] button to return to the **Purchase Request** window.

10. From the menu, select **File** → **Save** to update the funding information and save the PR.

Creating a Job Order

PRweb users can create job orders at the contract level. The System Administrator grants a user rights to manage funding information. If the user does not have these rights, funding and job order information is read-only.

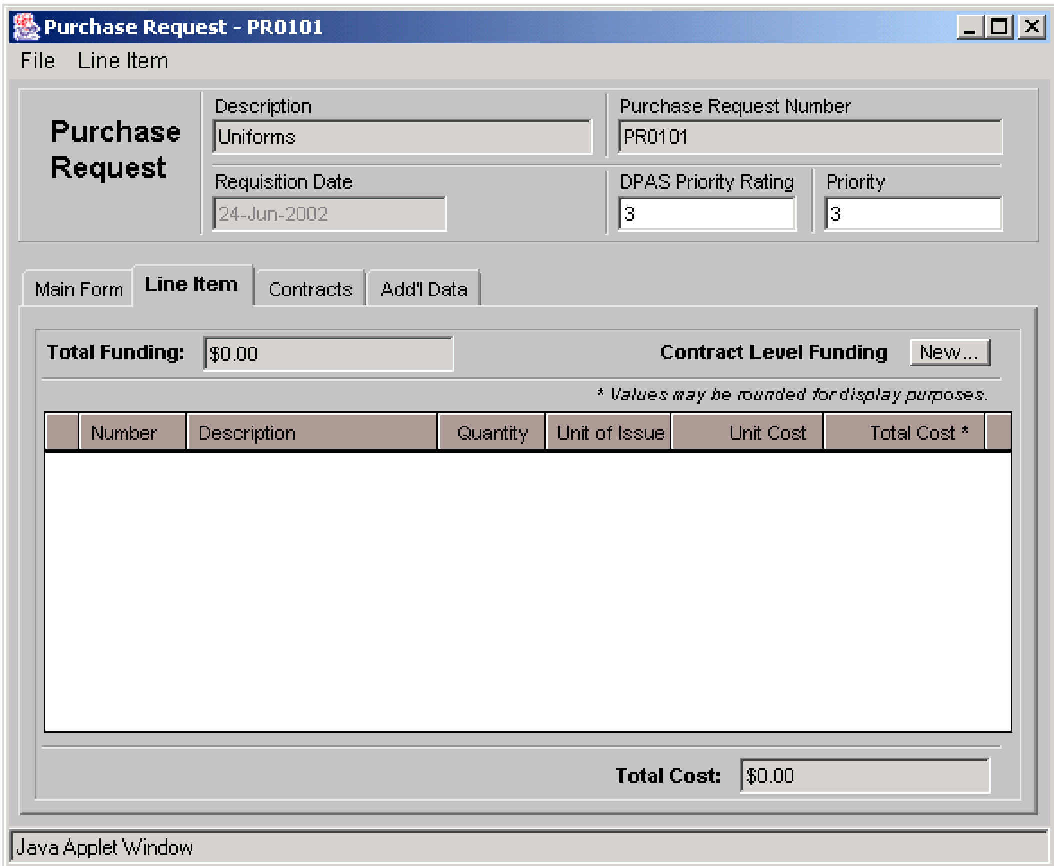

Figure 90: Purchase Request - <Purchase Request Number> Line Item Tab

1. Click the [**New**] button next to **Contract Level Funding**.

The ***Contract Level Funding*** *window opens.*

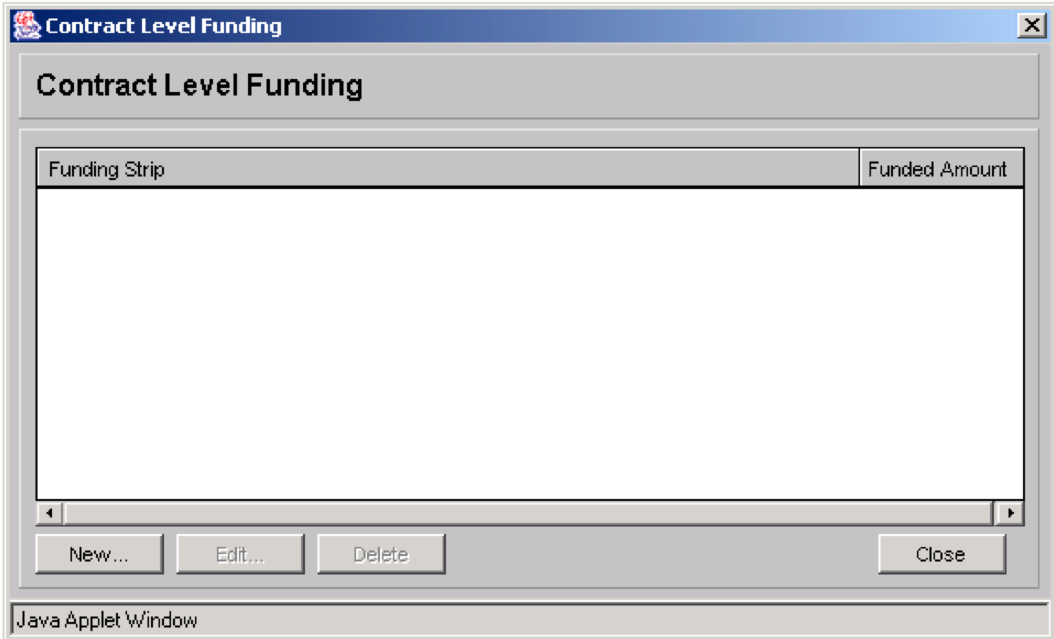

Figure 91: Contract Level Funding Window

2. Click the [**New**] button.

*The **Funding Sources – New** window opens.*

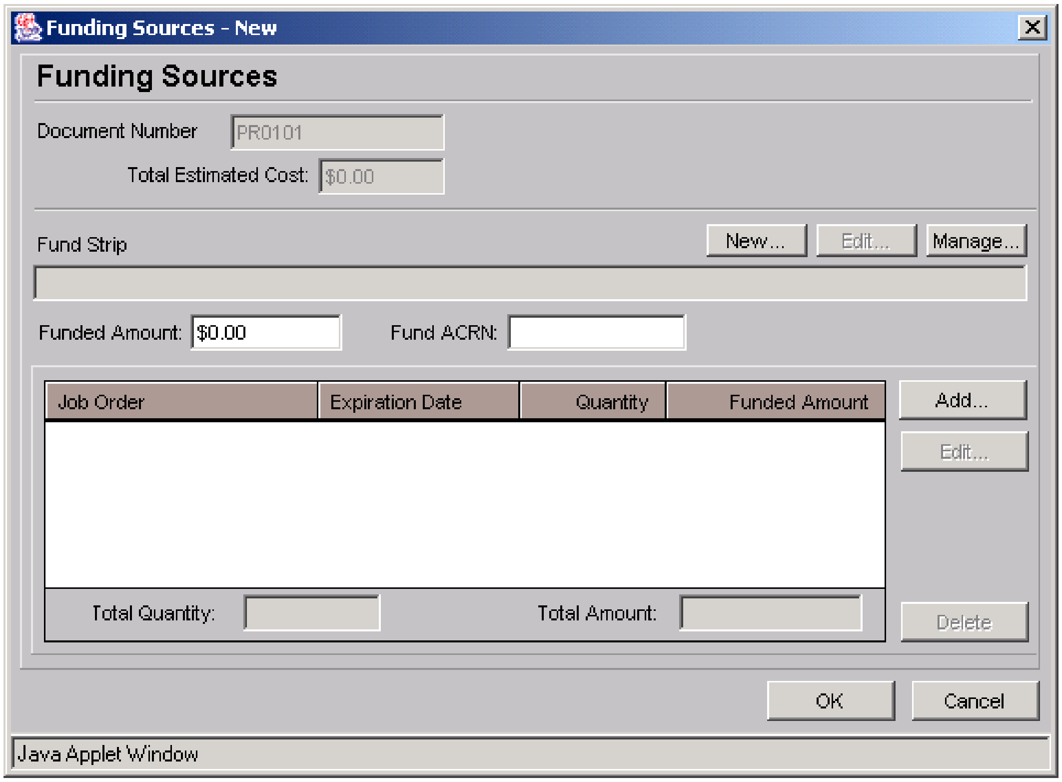

Figure 92: Funding Sources – New Window

3. Click the [**Add**] button next to the **Job Order** table.

   *The **Attach Job Order – New** window opens.*

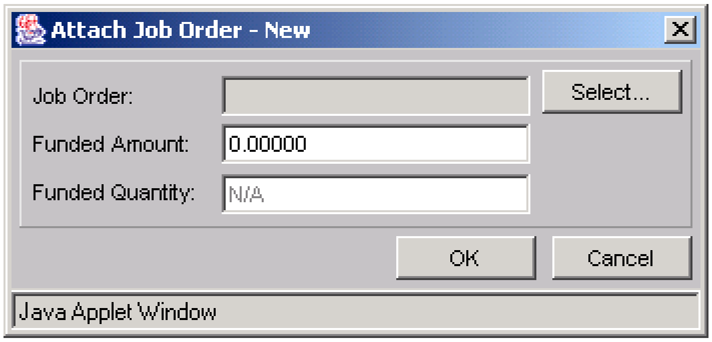

Figure 93: Attach Job Order – New Window

4. Click the [**Select**] button.

*The **Job Order Number Search** window opens.*

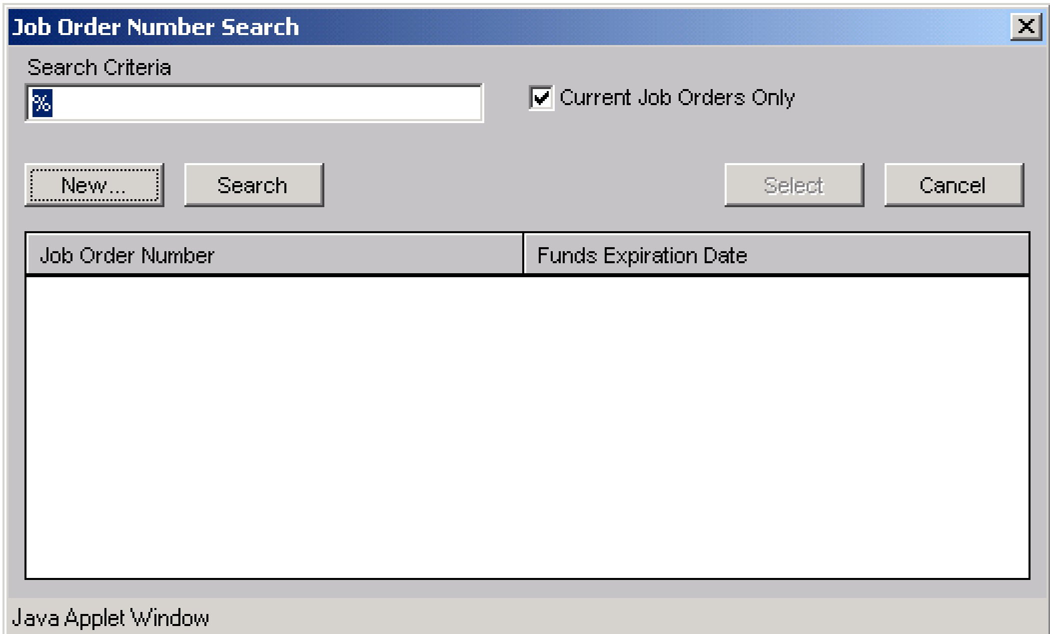

Figure 94: Job Order Number Search Window

5. Click the [**New**] button.

   *The **Create New Job Order** window opens.*

Figure 95: Create New Job Order Window

6. Enter a number in the **Job Order Number** field and an expiration date in the **Funds Expiration Date** field.

Note: The funds expiration date can be entered manually or by using the Auto-Calendar feature. For more information on the Auto-Calendar, refer to "Auto-Calendar Feature" section in *Chapter 2: PRweb Desktop*.

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7. Click [**OK**] to return to the **Job Order Number Search** window.

8. Double-click the new job order to return to the **Attach Job Order** window.

9. Click [**OK**] to return to the **Funding Sources – New** window.

   *The job order displays in the **Funding Sources – New** window.*

10. Click [**OK**] to return to the **Contract Level Funding** window.

11. From the menu, select **File** → **Save** to update the job order information and save the PR.

Attaching a Job Order

PRweb users can attach job orders at the contract level. The System Administrator grants a user rights to manage funding information. If the user does not have these rights, funding and job order information is read-only.

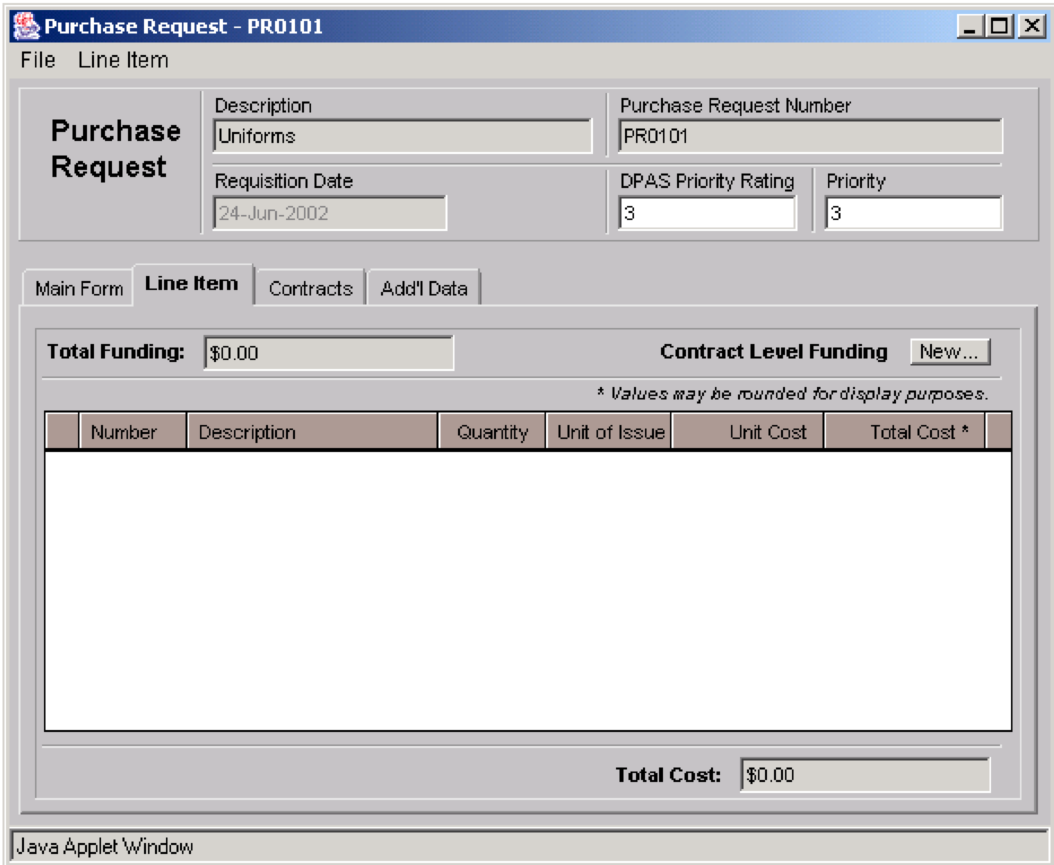

Figure 96: Purchase Request - <Purchase Request Number> Line Item Tab

1. Click the [**New**] button next to **Contract Level Funding**.

   *The **Contract Level Funding** window opens.*

2. Click the [**New**] button.

*The **Funding Sources – New** window opens.*

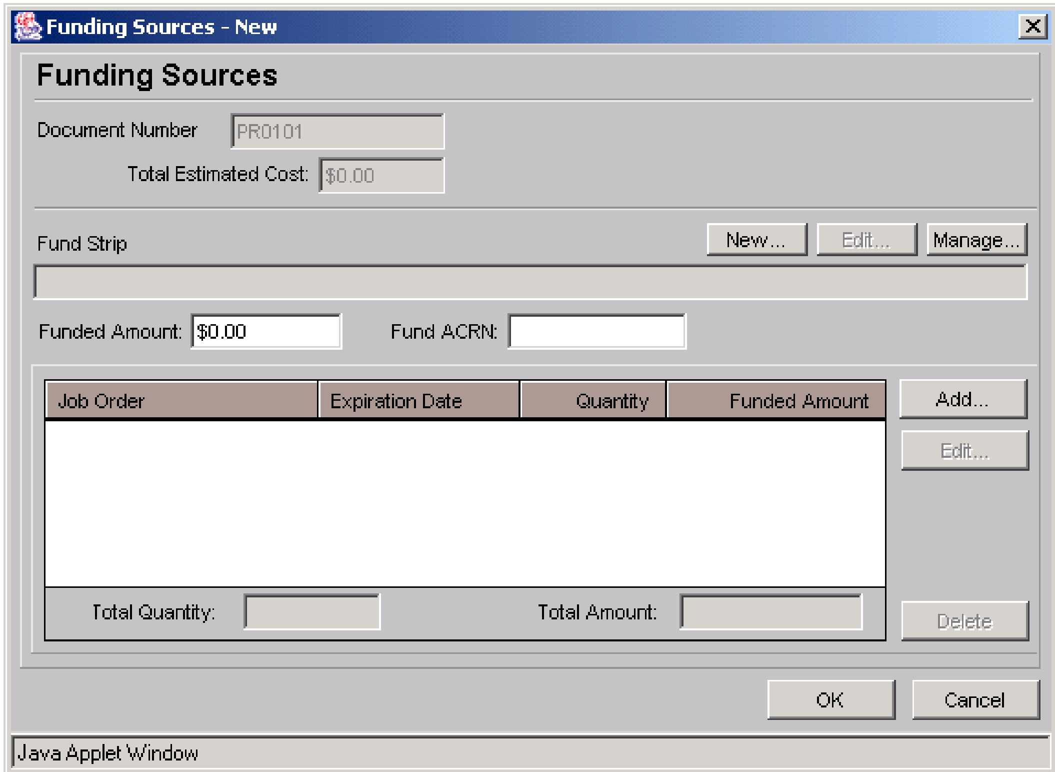

Figure 97: Funding Sources – New Window

3. Click the [**Add**] button next to the **Job Order** table.

   *The **Attach Job Order – New** window opens.*

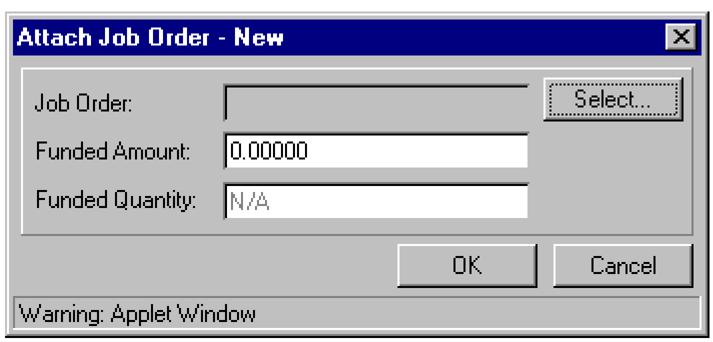

Figure 98: Attach Job Order – New Window

4. Click the [**Select**] button.

The ***Job Order Number Search*** *window opens.*

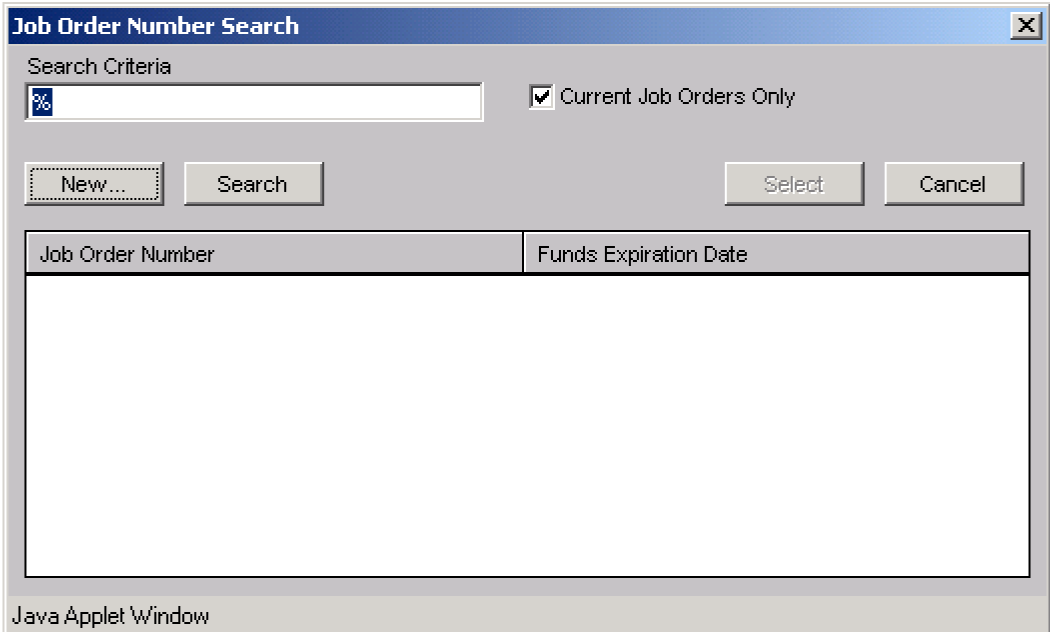

Figure 99: Job Order Number Search Window

5. Enter **Search Criteria**, and click the [**Search**] button.

The search results display.

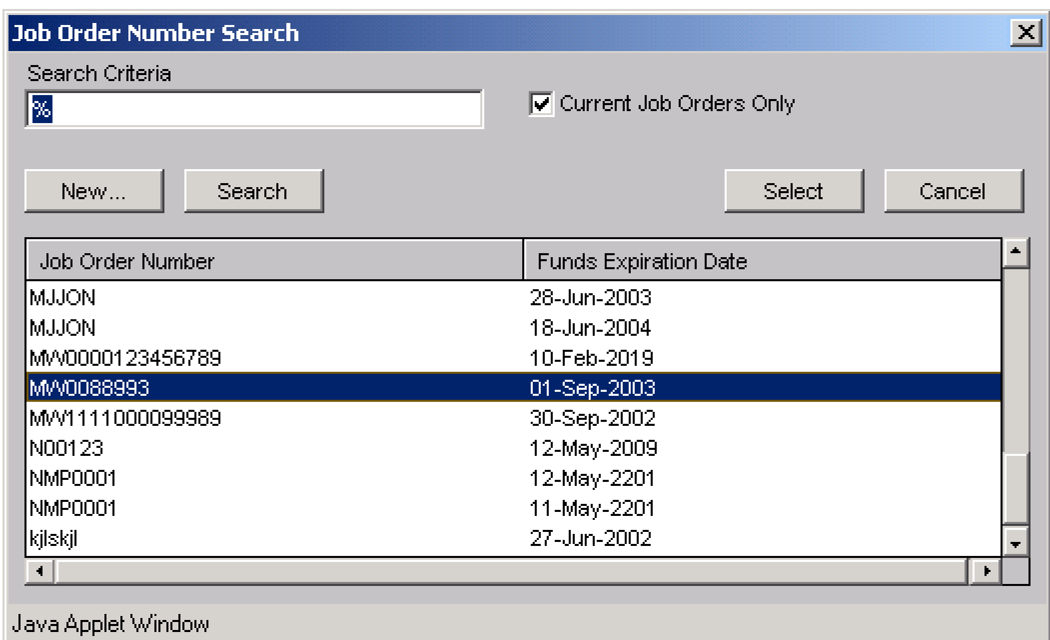

Figure 100: Job Order Number Search Window

6. Highlight the desired job order number and click the [**Select**] button.

*The **Attach Job Order - New** window opens.*

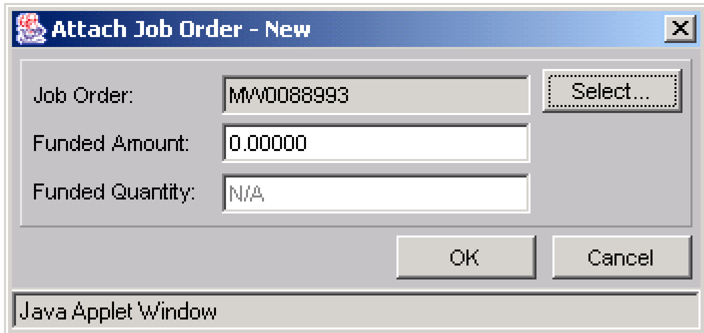

Figure 101: Attach Job Order – New Window

7. Click [**OK**] to return to the **Funding Sources - New** window.

8. Click [**OK**] to return to the **Contract Level Funding** window.

9. From the menu, select **File → Save** to update the job order information and save the PR.

Editing a Job Order

PRweb users can edit job orders at the contract level. The System Administrator grants a user rights to manage funding information. If the user does not have these rights, funding and job order information is read-only.

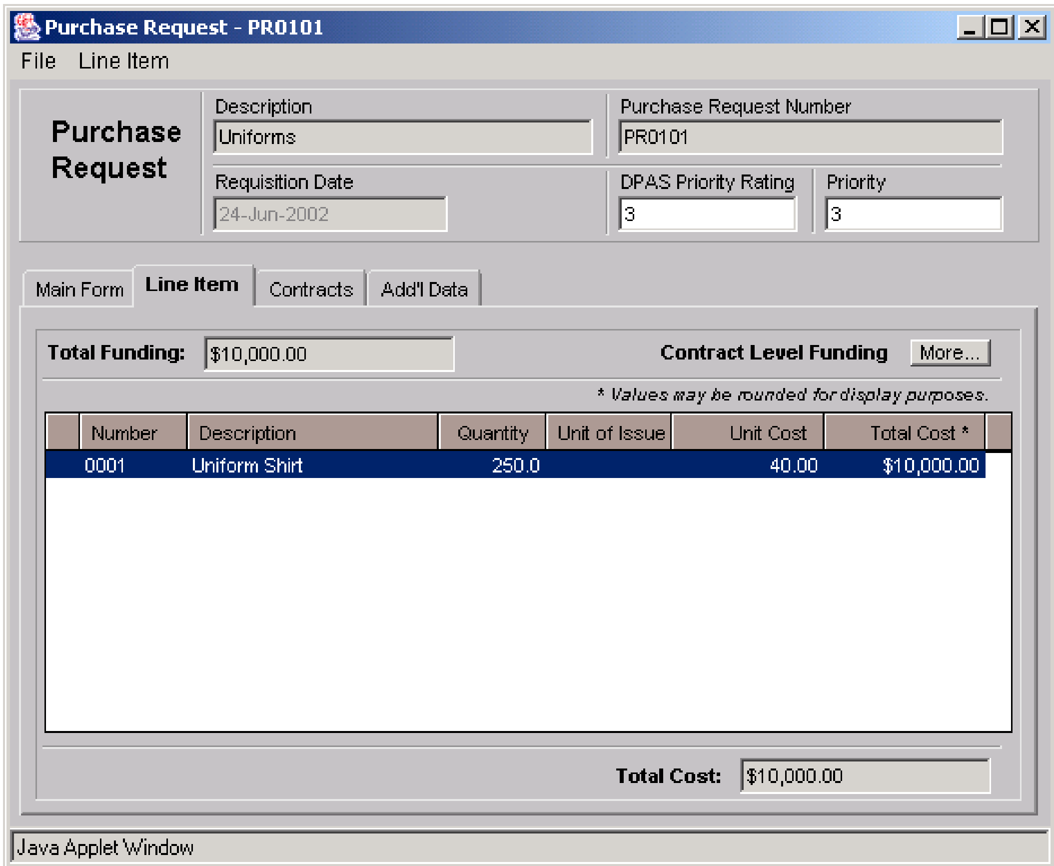

Figure 102: Purchase Request - <Purchase Request Number> Line Item Tab

1. Click the [**More**] button next to **Contract Level Funding**.

*The **Contract Level Funding** window opens.*

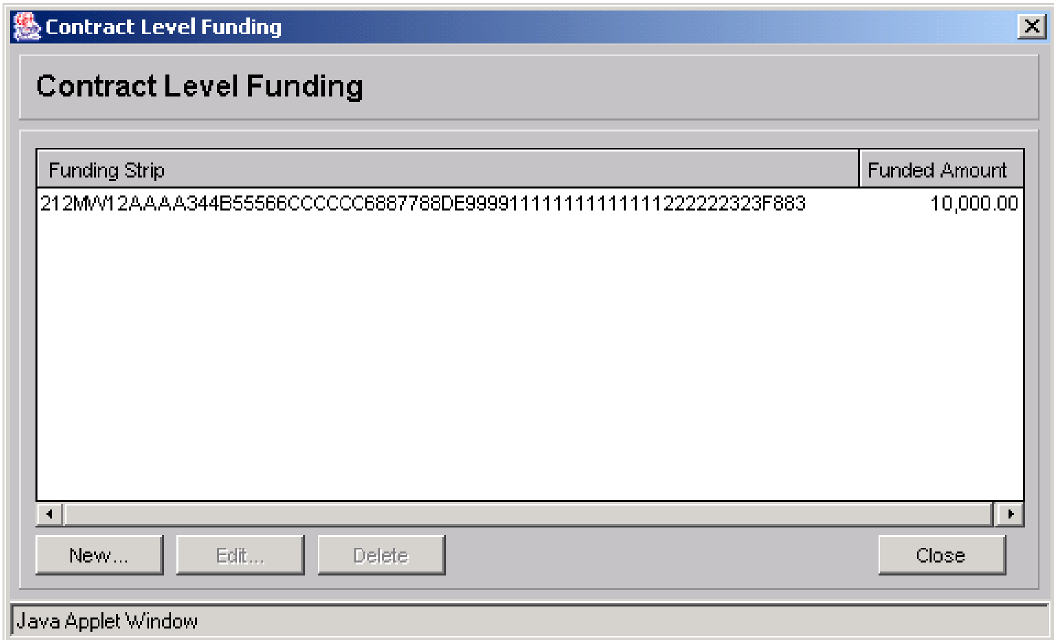

Figure 103: Contract Level Funding Window

2. Highlight an existing funding source and click the [**Edit**] button.

*The **Funding Sources** window opens.*

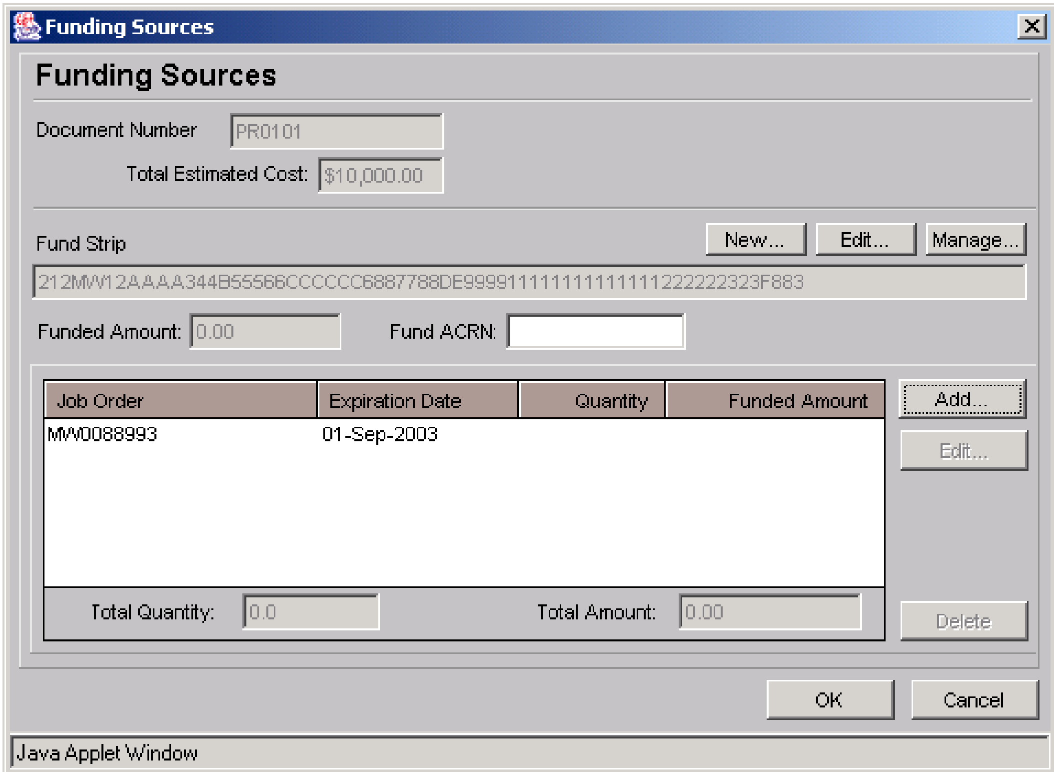

Figure 104: Funding Sources Window

3. Highlight the desired job order and click the [**Edit**] button next to the **Job Order** table.

   *The **Attach Job Order - <Job Order Name>** window opens.*

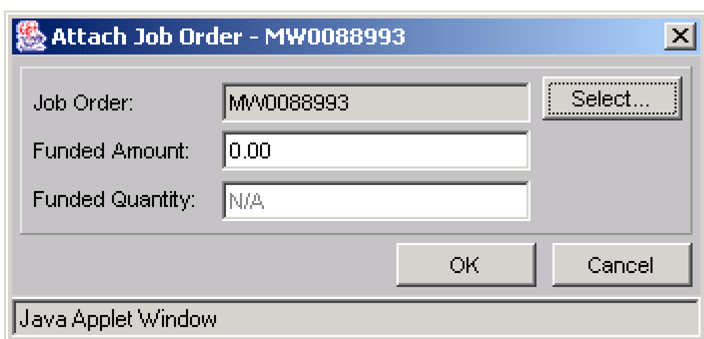

Figure 105: Attach Job Order - <Job Order Name> Window

4. Click the [**Select**] button.

*The **Job Order Number Search** window opens.*

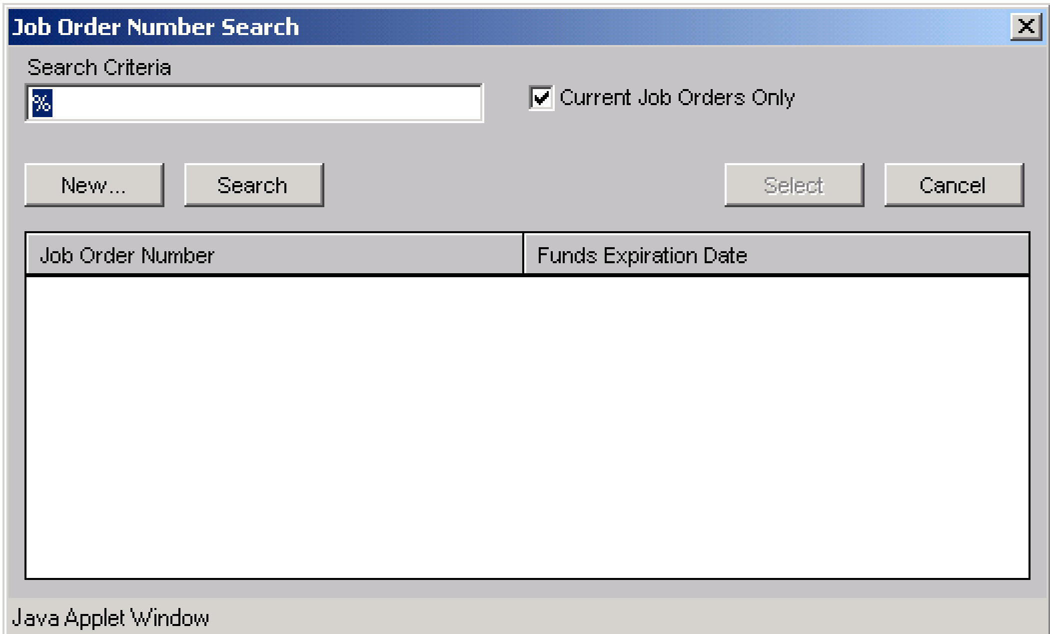

Figure 106: Job Order Number Search Window

5. Enter **Search Criteria**, and click the [**Search**] button.

6. Highlight a job order number and click the [**Select**] button.

   *The **Attach Job Order - <Job Order Name>** window opens with the new job order number displayed in the **Job Order** field.*

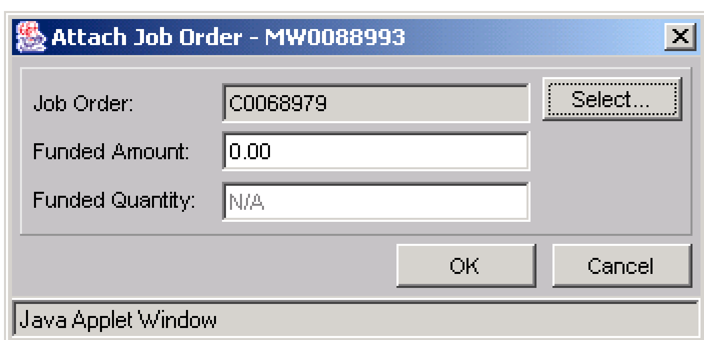

Figure 107: Attach Job Order - <Job Order Name> Window

7. Click [**OK**] to return to the **Funding Sources** window.

8. Click [**OK**] to return to the **Contract Level Funding** window.

9. From the menu, select **File** → **Save** to update the job order information and save the PR.

Deleting a Job Order

PRweb users can delete job orders at the contract level. The System Administrator grants a user rights to manage funding information. If the user does not have these rights, funding and job order information is read-only.

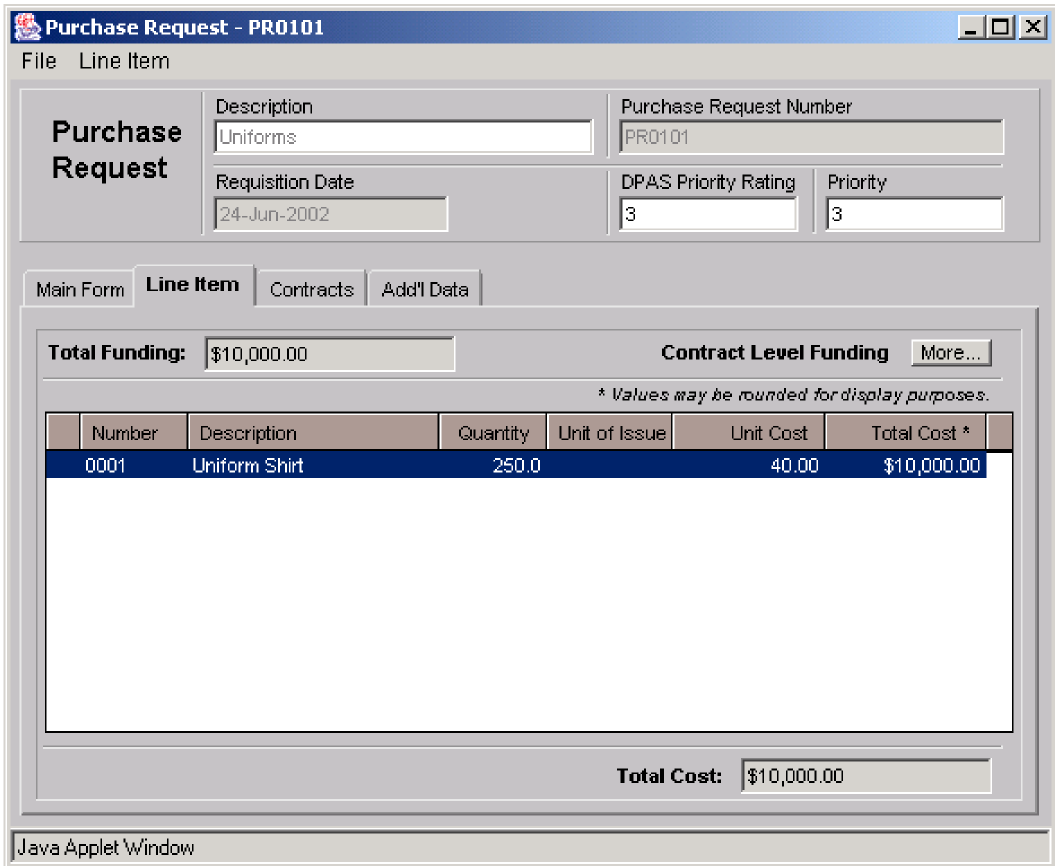

Figure 108: Purchase Request - <Purchase Request Number> Line Item Tab

1. Click the [**More**] button next to **Contract Level Funding**.

*The **Contract Level Funding** window opens.*

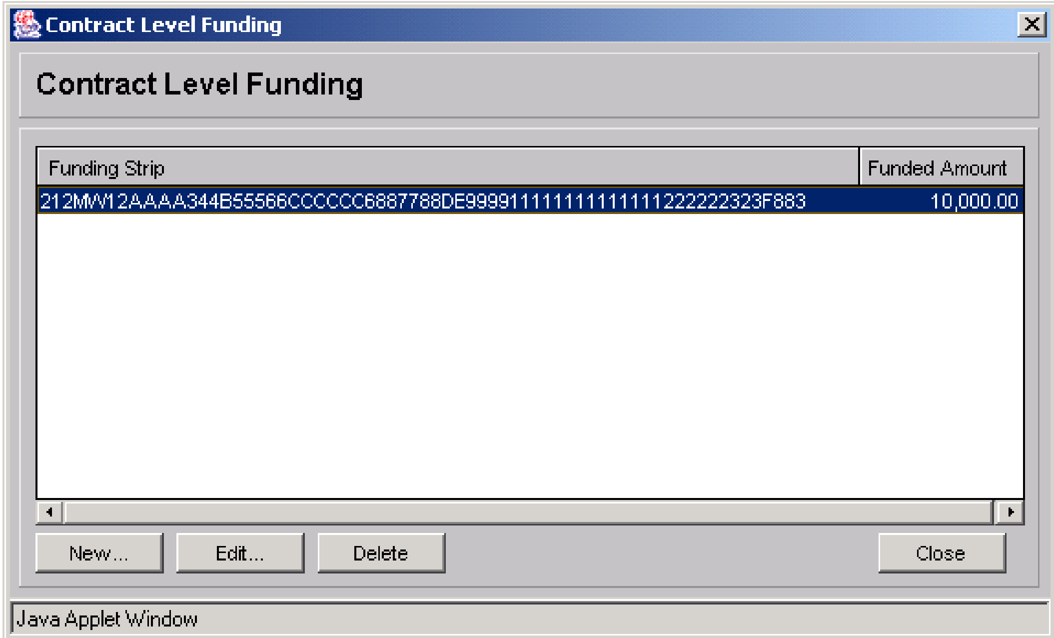

Figure 109: Contract Level Funding Window

2. Highlight an existing funding source and click the [**Edit**] button.

*The **Funding Sources** window opens.*

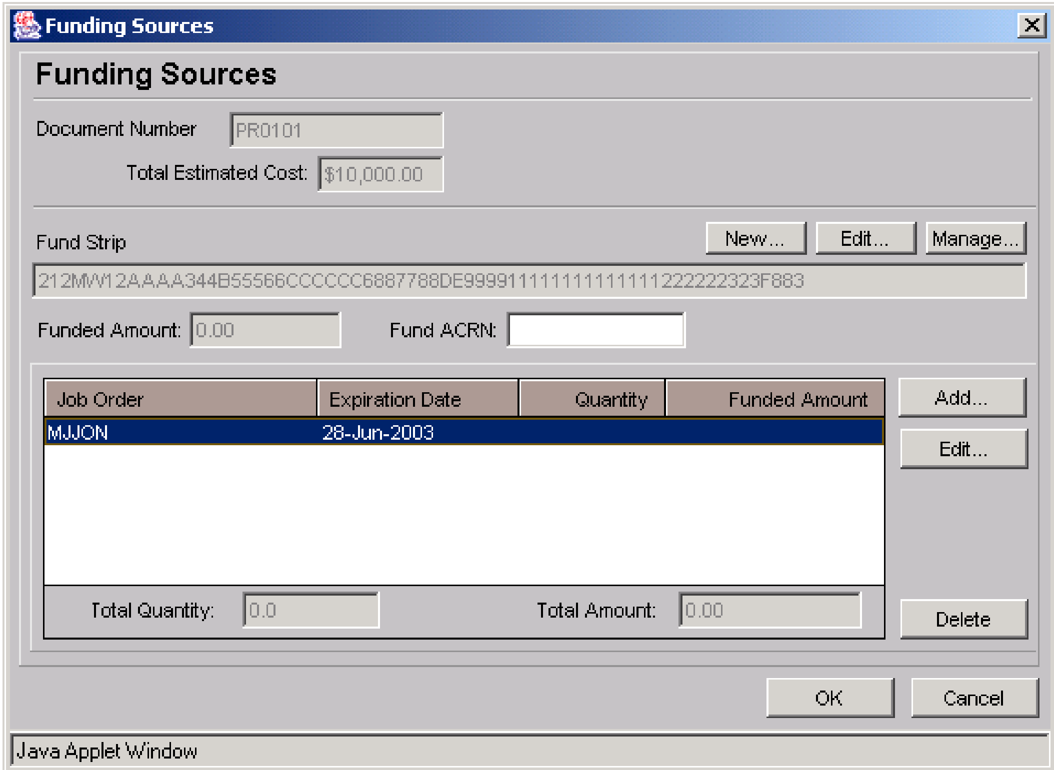

Figure 110: Funding Sources Window

3. Highlight the job order and click the [**Delete**] button next to the **Job Order** table.
4. Click the [**Yes**] button in the **Confirmation** window.

   *The **Funding Sources** window displays with the job order deleted from the table.*
5. Click [**OK**] to return to the **Contract Level Funding** window.
6. From the menu, select **File** → **Save** to update the job order information and save the PR.

Contracts Tab

The *Contracts* tab of the PR allows the *PRweb* user to designate **Suggested Contract Information**, a **Contract Number**, and a **Suggested Preference Program**.

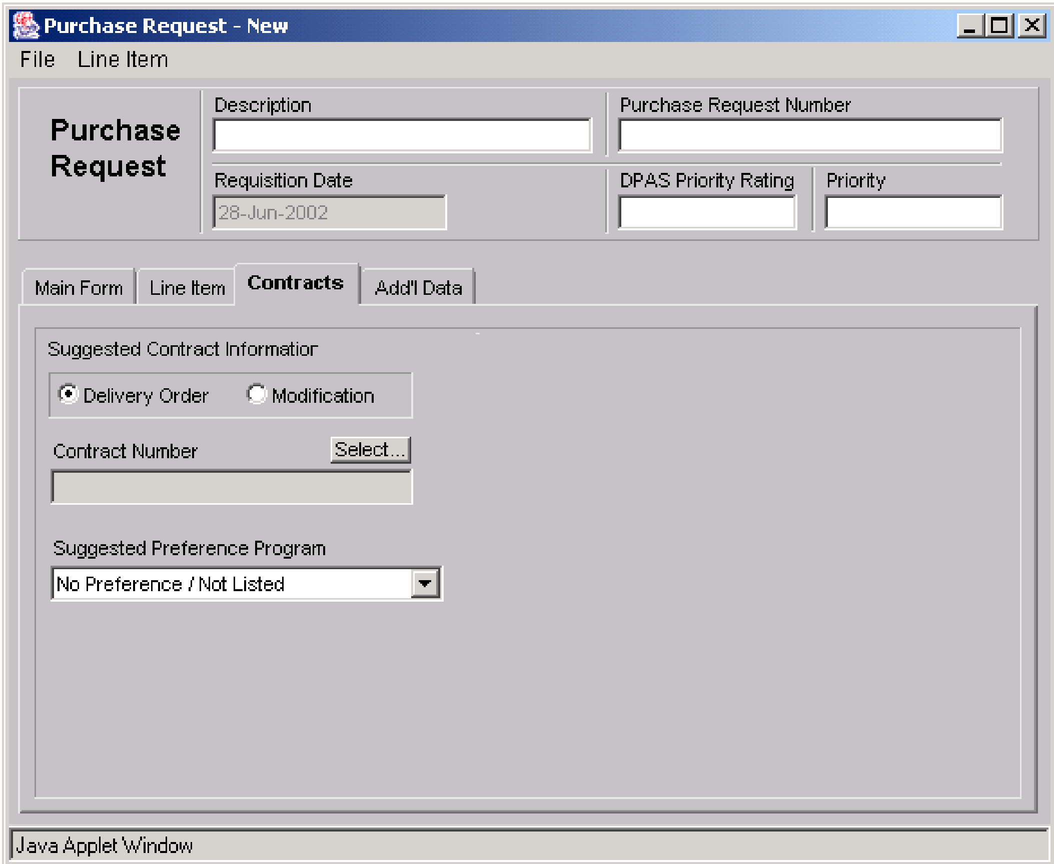

Figure 111: Purchase Request – New – Contract Tab

1. Select the appropriate **Suggested Contract Information** radio button.

   The **Suggested Contract Information** radio buttons enable the *PRweb* user to suggest either a Delivery Order or Modification for the requirement.

2. Click the [**Select**] button next to the **Contract Number** field.

   The **Contract Number** search field allows the *PRweb* user to select an existing contract in PD^2 and associate it with the PR. The **Contract Number** search field pulls all contracts available in the PD^2 database that meet the *PRweb* user's search criteria.

*The **Attachment Search** window opens.*

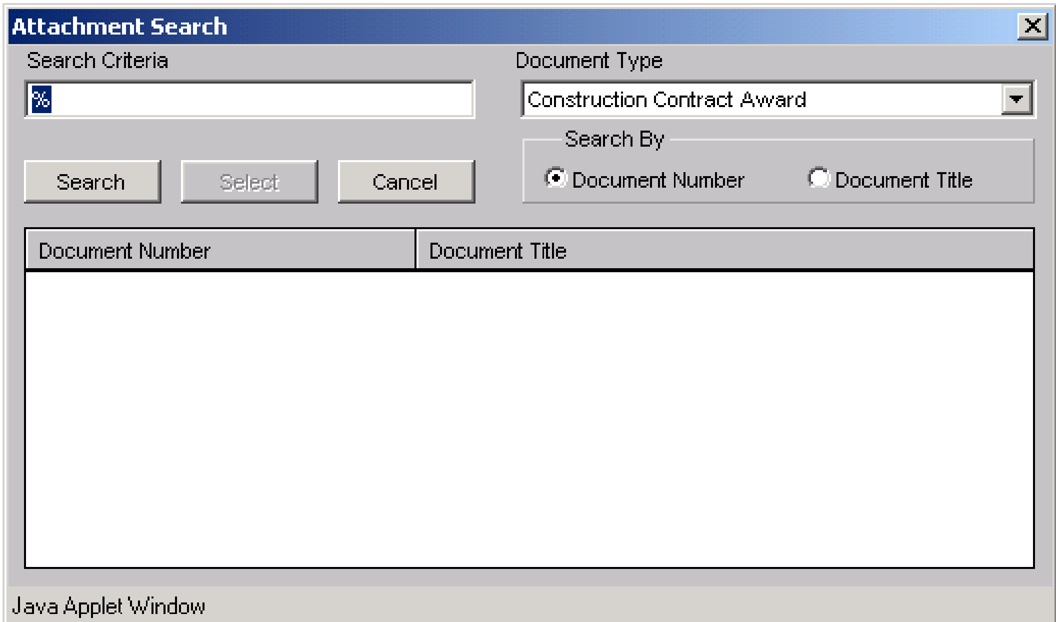

Figure 112: Attachment Search Window

3. Select the appropriate contract type from the **Document Type** drop-down list box.

4. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information on searches, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

---

5. Highlight the desired **Document Number** for the contract.

6. Click the [**Select**] button.

   The Contracts *tab displays with the selected contract in the **Contract Number** field.*

7. Select the desired preference program from the **Suggested Preference Program** drop-down list box.

   The **Suggested Preference Program** drop-down list box allows the *PRweb* user to designate the desired Preference Program for the requirement.

8. Click the desired Preference Program.

Add'l Data Tab

The *Add'l Data* tab allows the *PRweb* user to add any **Additional Point of Contact (POC) Information** and **Security Clearance Requirements**. The user can also view any Contracting Officer Notes (**KO Notes**).

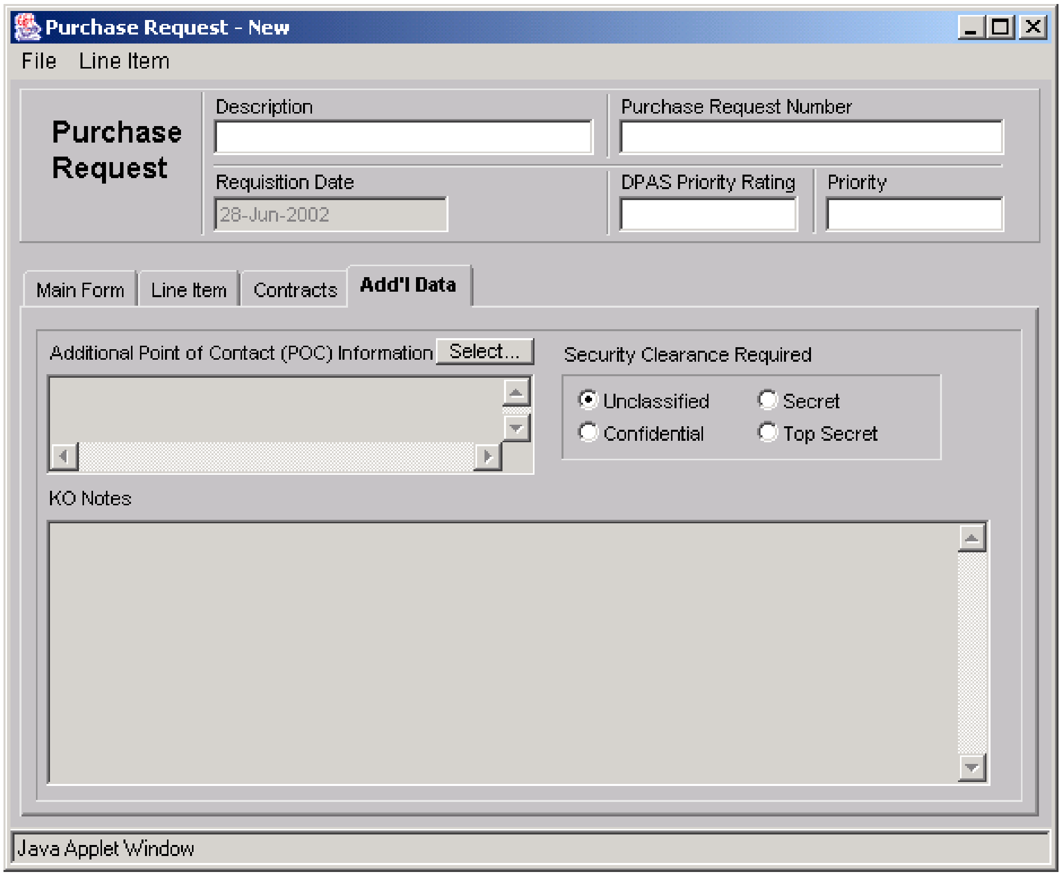

Figure 113: Purchase Request – New – Add'l Data Tab

1. Click the [**Select**] button next to the **Additional Point of Contact (POC) Information** field.

   The **Additional Point of Contact (POC) Information** field allows the *PRweb* user to include one additional POC on the PR. The POC information is pulled from the PD² database.

The ***Contact Search*** *window opens.*

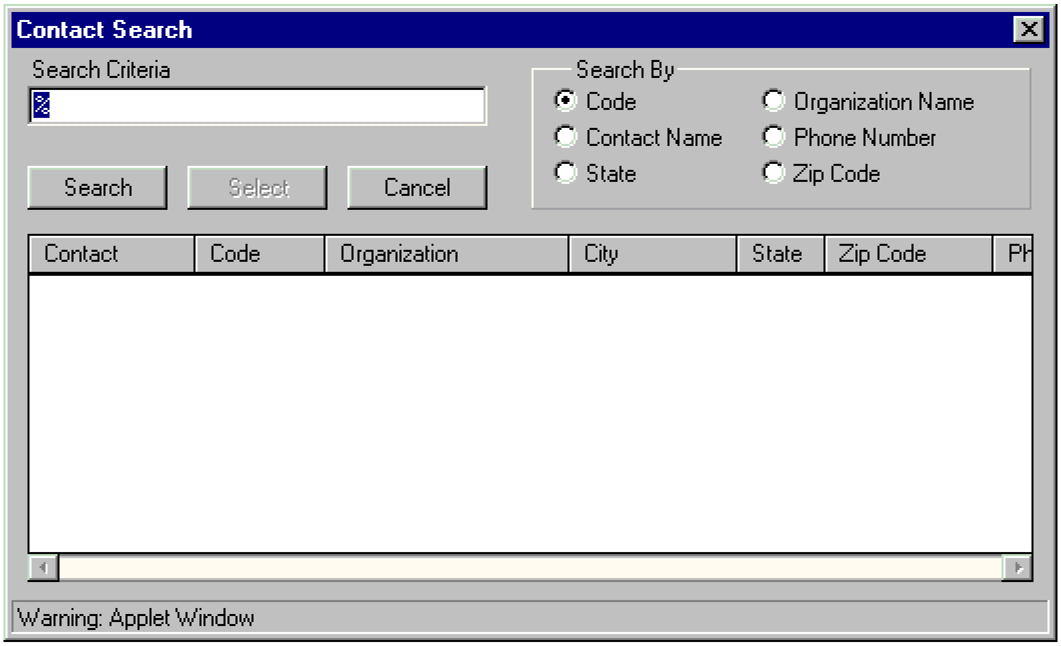

Figure 114: Contact Search Window

2. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information on searches, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

3. Highlight the desired contact.

4. Click the [**Select**] button.

   The Add'l. Data *tab displays the selected contact in the* ***Additional Point of Contact (POC) Information*** *field. The [****Select****] button is now a [****Remove****] button.*

5. Select the appropriate **Security Clearance Required** radio button.

   The **Security Clearance Required** radio buttons enable the *PRweb* user to add additional security information for the requirement.

Note: The **KO Notes** field is provided for the Contracting Officer (KO) to input any additional requirement information in PD^2. If the PR is returned to the *PRweb* user, the KO notes are displayed in the field. In *PRweb*, this field is read-only.

Saving a Purchase Request

The **Save** menu option allows the *PRweb* user to save all changes made to the PR. Upon completing a PR, the *PRweb* user must save the PR information. If the PR is updated with new information, the PR must also be saved. To save a PR, select **File → Save** from the menu.

Note: Updating and saving are two separate functions. A PR that has been updated with information needs to be saved in order to save the PR in its updated status.

Closing a Purchase Request

The **Close** menu option allows the *PRweb* user to close the PR.

To close the PR:

1. From the menu, select **File** → **Exit**.
2. Click the [**Yes**] button in the **Save Confirmation** window if the PR information needs to be saved. Click the [**No**] button in the **Save Confirmation** window if the PR information does not need to be saved.

Note: If a PR has been updated with new information, it is necessary to save the PR before closing it.

Editing a Purchase Request

PRweb users can open PRs for viewing from the *Drafts*, *Inbox*, *Outbox* and *Archives* folders. Open PRs contained in the *Drafts*, *Inbox* or *Outbox* folders may also be edited.

To open a PR:

1. From the desktop, click the plus symbol **(+)** next to the desired folder (e.g., *Drafts*, *Inbox*, *Outbox*, or *Archive*).
2. Highlight the PR.
3. From the menu, select **Purchase Request** → **Open**, or double-click the highlighted PR.
4. Edit or view the PR as necessary.

Note: For more information refer to *Creating a New Purchase Request* in this chapter.

Copying a Purchase Request

PRweb users can copy an existing PR that resides in any of the desktop folders. The ability to copy PRs is a valuable tool that can reduce the creation time for a PR by eliminating repetitive data entry. Using the Copy feature results in creating a copy of the entire PR including line items, and funding. Funding that is not available to the specific user is not copied and the user is notified of this in a **Warning** window.

Note: *PRweb* users can also copy PR Mods. However, the copied PR Mod displays in a **Purchase Request – New** window.

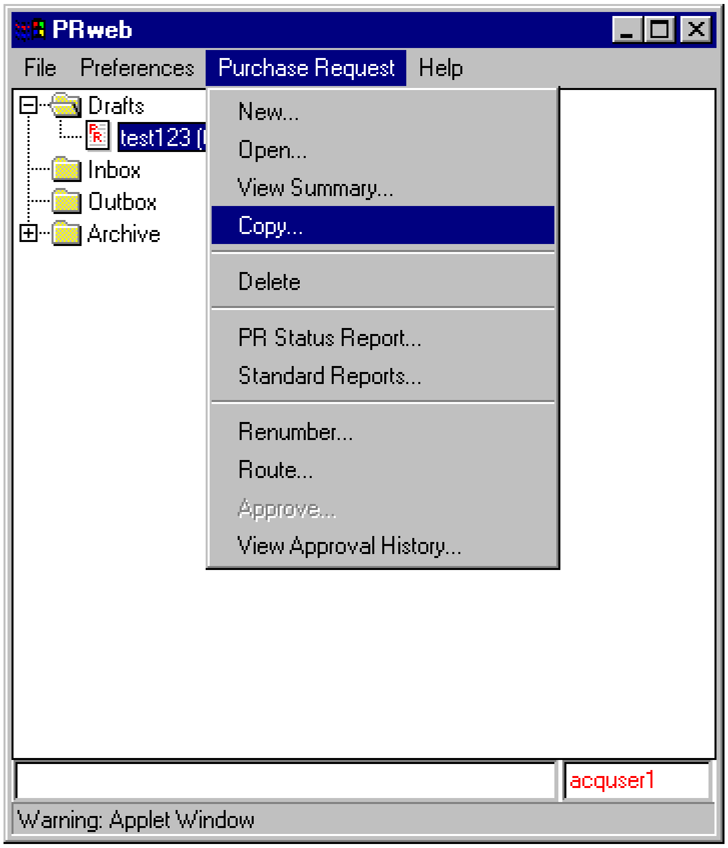

Figure 115: Purchase Request Copy Menu Option

1. From the *PRweb* user's desktop, highlight the desired PR to be copied.
2. From the menu, select **Purchase Request → Copy**.

*The **Purchase Request - New** window opens.*

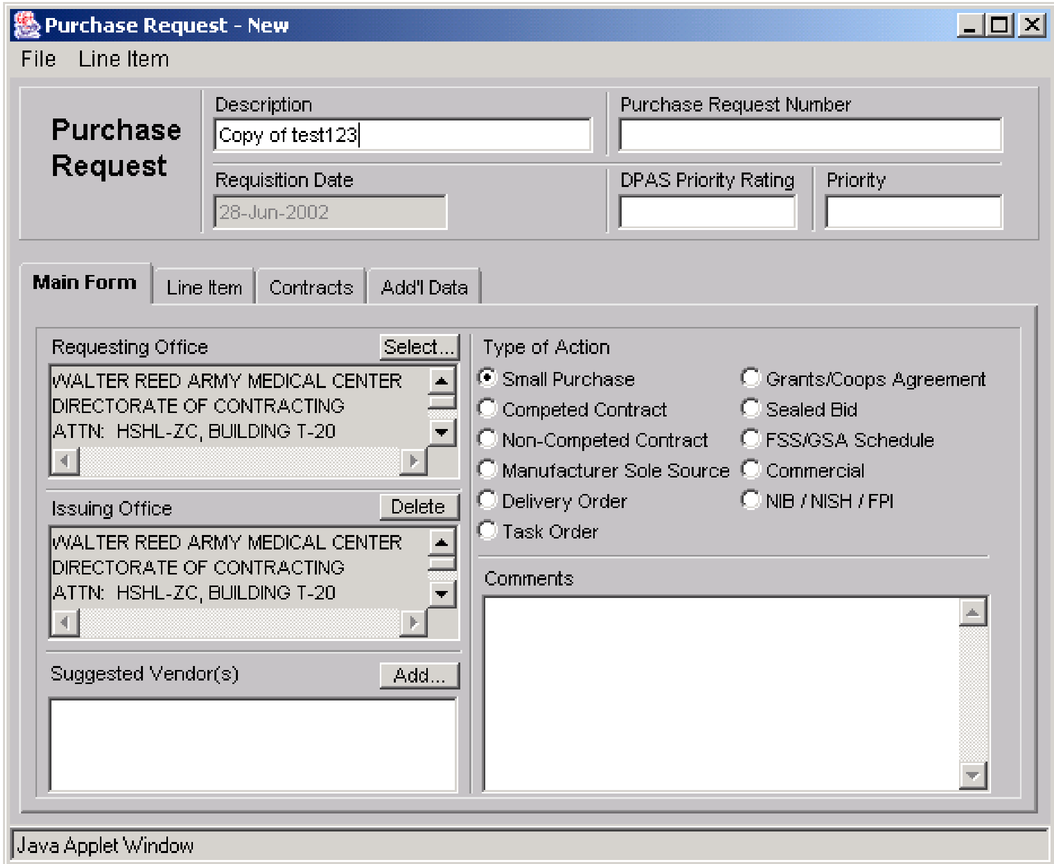

Figure 116: Purchase Request – New – Main Form Tab

3. Enter a new description for the PR in the **Description** field, if necessary.

   The **Description** field automatically populates with the description “Copy of <Description>.”

4. Enter a unique number in the **Purchase Request Number** field.

5. The user can make any necessary changes to the PR and associated line items, attachments, and funding before saving the PR.

6. From the menu, select **File → Save** to save the PR Copy.

   The copied PR display in the Drafts Folder.

Note: Any information contained on the original PR that is PD^2-specific data is not copied onto the new PR.

Copying a PR Mod

PRweb users can copy an existing PR Mod. This that resides in any of the desktop folders. The ability to copy PRs is a valuable tool that can reduce the creation time for a PR by eliminating repetitive data entry. Using the Copy feature results in creating a copy of the entire PR including line items, and funding. Funding that is not available to the specific user is not copied and the user is notified of this in a **Warning** window.

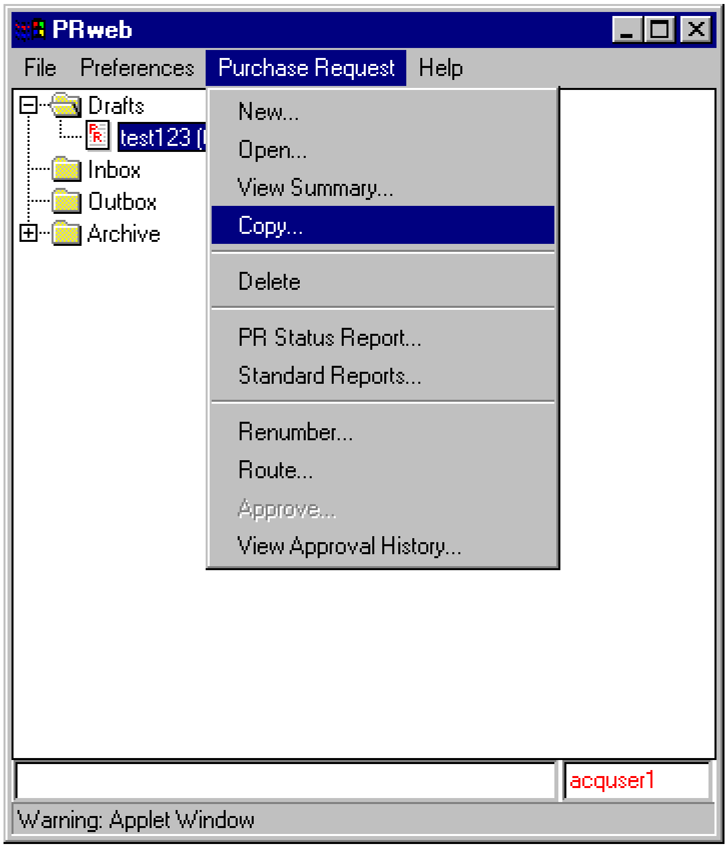

Figure 117: Purchase Request Copy Menu Option

1. From the *PRweb* user's desktop, highlight the desired PR Mod to be copied.

2. From the menu, select **Purchase Request → Copy**.

*The **Purchase Request - New** window opens.*

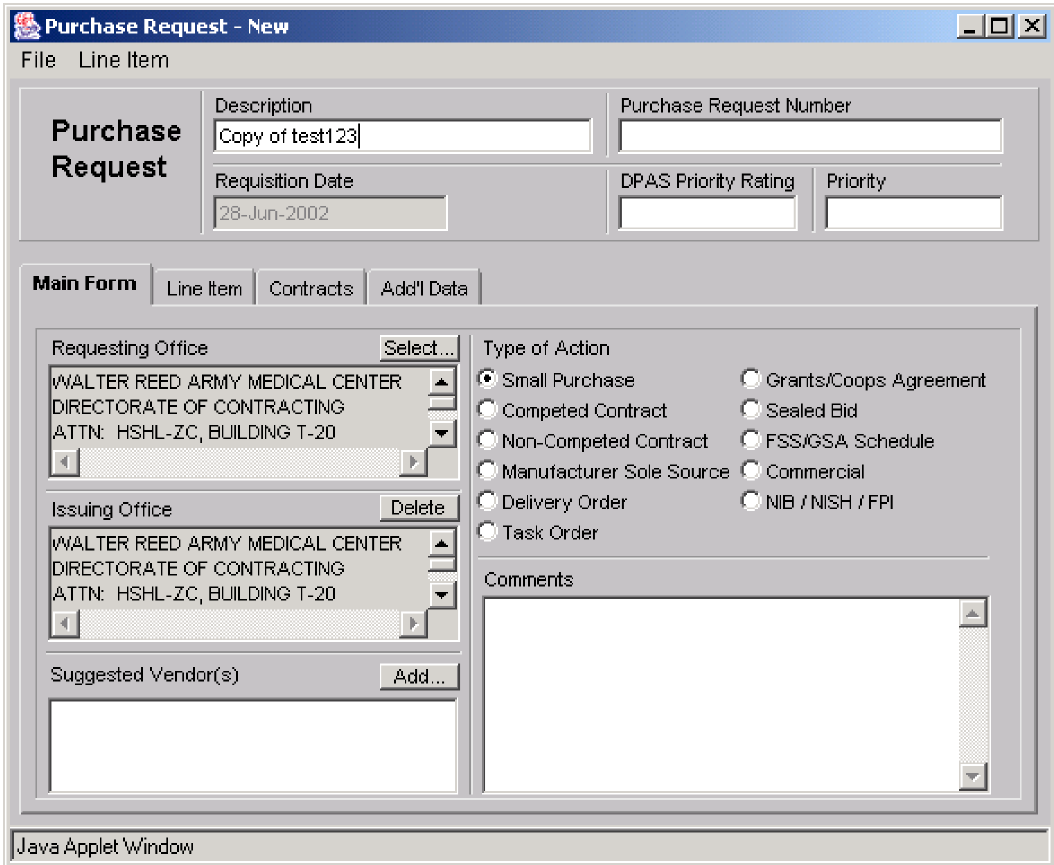

Figure 118: Purchase Request – New – Main Form Tab

3. Enter a new description for the PR in the **Description** field, if necessary.

   The **Description** field automatically populates with the description "Copy of <Description>."

4. Enter a unique number in the **Purchase Request Number** field.

6. The user can make any necessary changes to the PR and associated line items, attachments, and funding before saving the PR.

7. From the menu, select **File → Save** to save the PR Copy.

   The copied PR display in the Drafts Folder.

Note: Any information contained on the original PR that is PD^2-specific data is not copied onto the new PR.

Deleting a Purchase Request

The **Delete** feature allows the *PRweb* user to delete existing PR and PR Mods that reside in the user's *Drafts* or *Outbox* folders. The user cannot delete a document that is in the *Inbox* or *Archive* folders. Deleting a PR or PR Mod removes the document from the user's desktop and the *PRweb* database. The PR Number is then available for future use.

To delete a PR or PR Mod:

1. From the *PRweb* user's desktop, highlight the desired PR or PR Mod to be deleted.
2. From the menu, select **Purchase Request → Delete**.

   *A **Confirmation** window appears to confirm the command to delete the document.*

3. Click the [**Yes**] button.

Renumbering a Purchase Request

PRweb users can renumber a PR after it has been saved. A PR that resides in the *Drafts*, *Inbox*, or *Outbox* can be renumbered.

1. From the *PRweb* user's desktop, highlight the desired PR.
2. From the menu, select **Purchase Request → Renumber**.

   *The **PR Renumber** window opens.*

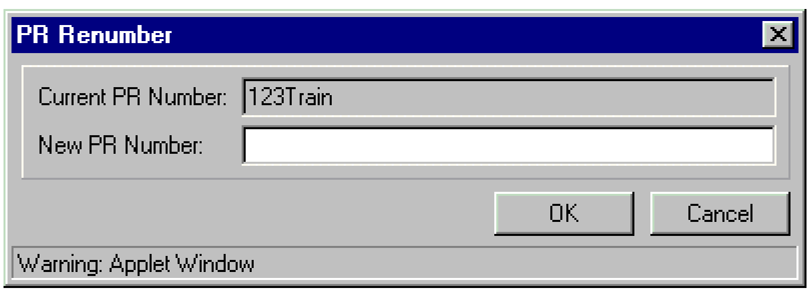

Figure 119: PR Renumber Window

3. Enter the new PR number in the **New PR Number** field.
4. Click [**OK**] to save the new number.

View Summary

PRweb users can view and print a synopsis of the PR information.

1. From the user's desktop, highlight a PR.
2. From the menu, select **Purchase Request → View Summary**.

   The ***Purchase Request Summary View*** *window opens.*

Figure 120: Purchase Request Summary View Window

3. Click the [**Print HTML Report**] button.

   A new Web browser window opens.

4. From the menu, select **File → Print.**

   The PR prints to the machine's default printer.

5. From the Web browser window menu, select **File → Close**.

   The Web browser window closes.

6. Click the [**Close**] button in the **Purchase Request Summary View** window.

Chapter 5: PR Modifications

PRweb allows the *PRweb* user to create a PR Modification by highlighting the archived PR. The PR Modification (PR Mod) contains the contract and line item level information from the archived base PR. The PR Mod feature is similar to the PR feature. *PRweb* allows the requesting agent to create, route, approve, and submit the PR Mod to the Contracting Office.

In This Chapter…

Using the PR Modifications functions described in this chapter, you can:

- Create a PR Modification
- Manage a PR Modification
- Renumber a PR Modification

In order for a PR Mod to be created from a PR, following criteria must be met:

- The PR has been approved in PD^2
- A PR Mod has not been created in PD^2 off the PR
- An unapproved/unreleased PR Mod does not exist in PD^2
- A PR Mod for the selected PR is not in progress in *PRweb*

Note: If a new PR Mod is being created from an existing PR Mod that was created in *PRweb*, the existing PR Mod must be approved and released in PD^2.

The PR Mod that is created in *PRweb* will contain all the conform information that exists in PD^2 for the base document. Attachments that have been generated with the base document will be attached to the resulting PR Mod. However, the DD254 that was added to the base document is not carried over to the PR Mod that is created in *PRweb*.

Creating a PR Modification

To create a new Purchase Request Modification:

1. Highlight the desired PR in the Archive folder.
2. From the menu, select **Purchase Request → New → PR Modification**.

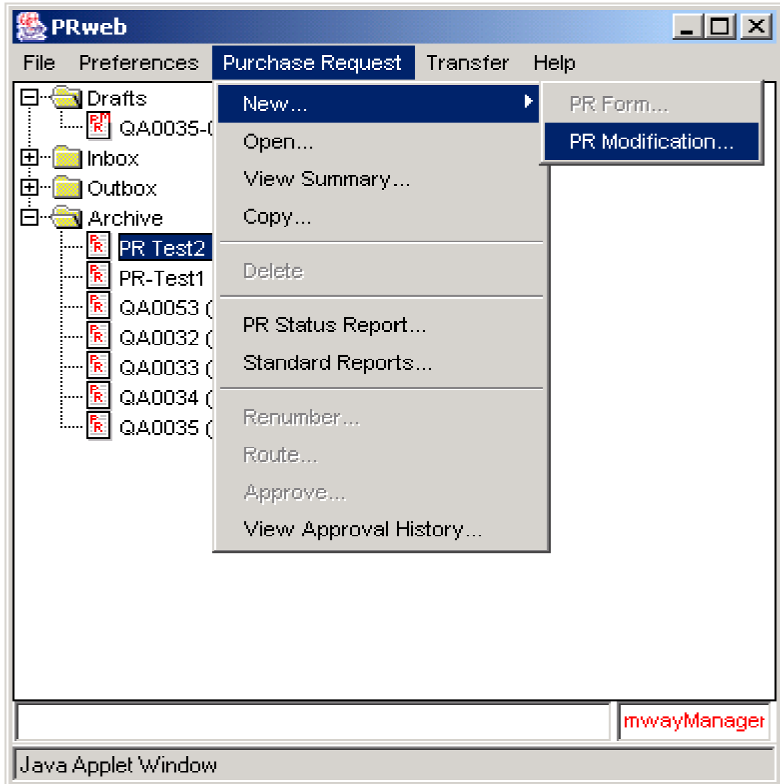

Figure 121: New PR Modification Menu Option

3. Enter the PR Modification extension number in the **Select Modification Number** window.

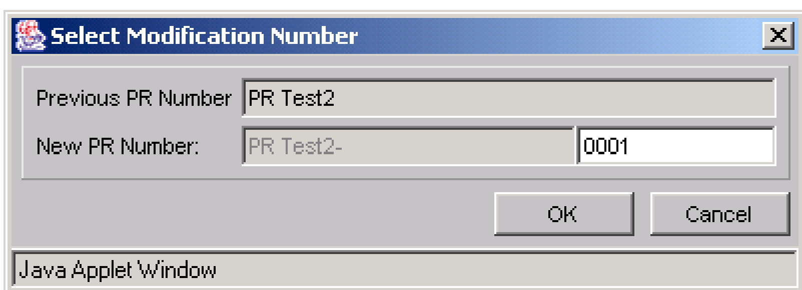

Figure 122: Select Modification Number Window

Note: The **Previous PR Number** field is read-only. The PR Modification number consists of the Previous PR Number and a four digit PR Modification extension number. The extension number defaults to the next available number, however the *PRweb* user is able to edit the extension number.

---

4. Click the [**OK**] button to create a new PR Modification.

   The PR Modification displays.

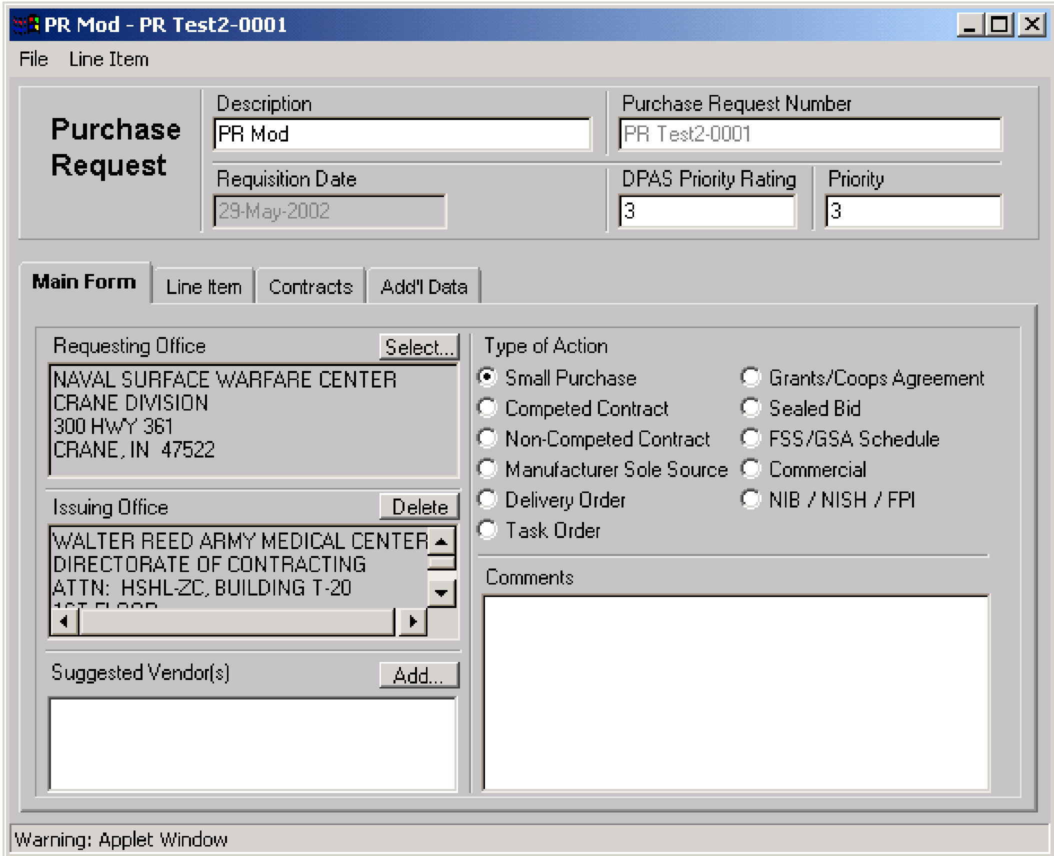

Figure 123: PR Mod - <PR Modification Number> Window

The PR Mod Header displays at the top of the ***PR Mod*** *window and is visible from every tab of the* ***PR Mod*** *window.*

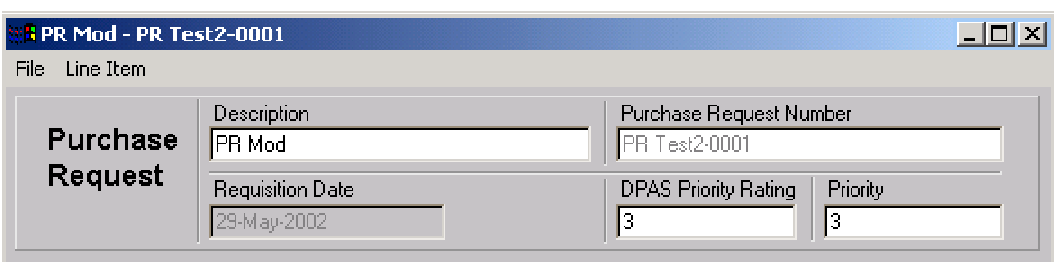

Figure 124: New PR Modification Header

5. Enter a description in the **Description** field.

Note: The *PR Modification* defaults the description to display "PR Mod".   However, the *PRweb* user is able to edit the description.

The description allows the *PRweb* user to assign a descriptive reference of up to 60 characters. This field is required to save a PR.

6. The **Purchase Request Number** field is read-only and displays the PR Modification Number previously selected.

7. Enter the Defense Priority Allocation System (DPAS) Priority Rating in the **DPAS Priority Rating** field.

   This field holds up to 30 characters.

8. Enter the appropriate priority number in the **Priority** field.

   This field holds any number between 1 and 15.

Managing a PR Modification

The *PRweb* user is able to edit, view, copy, approve, and route PR Mods. Managing a PR Mod is similar to managing PRs. For more information on managing a PR, refer to *Chapter 4: Purchase Request*. For more information on routing a PR Mod, refer to *Chapter 9: Workflow*.

Renumbering a PR Modification

PRweb users can renumber a PR Mod after it has been saved. A PR Mod that resides in the *Drafts*, *Inbox*, or *Outbox* folders can be renumbered. PR Mods that are in the *Archive* folder cannot be renumbered.

1. From the *PRweb* user's desktop, highlight the desired PR.

2. From the menu, select **Purchase Request → Renumber**.

   *The **PR Renumber** window opens.*

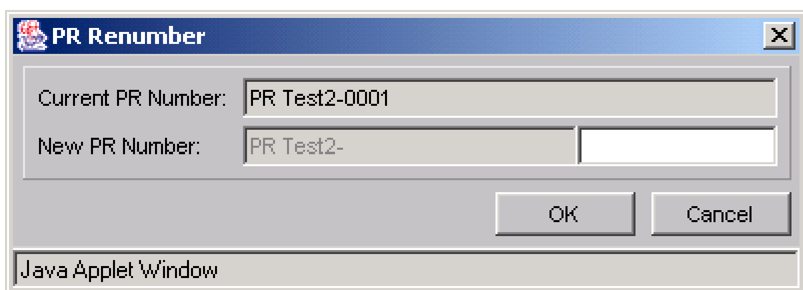

Figure 125: PR Renumber Window

3. Enter the new PR Modification extension number in the **New PR Number** field.

4. Click [**OK**] to save the new number.

Chapter 6: Line Item

Creating a Line Item

1. From the menu, select **Line Item → New → CLIN**.

   *The **Line Item Detail – New** window opens with the* Detail *tab displayed.*

   The **Line Item Detail** header displays at the top of the **Line Item** form and is visible from every tab of the **Line Item Detail** window.

In This Chapter…

Using the Line Item Detail functions described in this chapter, you can:

- Create a Line Item
- Manage Funding Sources
- Manage Funding Strips
- Manage Job Orders
- Create a SubCLIN

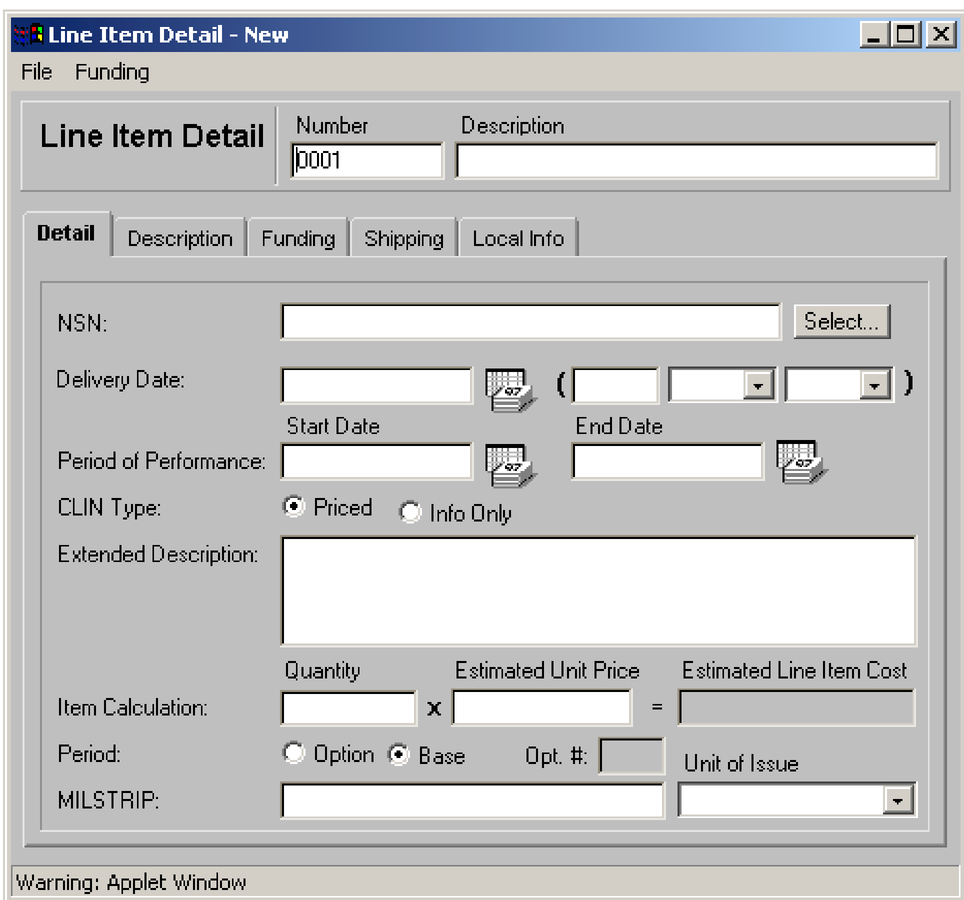

Figure 126: Line Item Detail – New - Detail Tab

2. Enter a description in the **Description** field.

   The **Description** field for the line item holds up to 65 characters.

Detail Tab

The *Detail* tab allows the *PRweb* user to provide information pertaining to the **NSN**, **Delivery Date,** or **Period of Performance**, as well as **CLIN Type**, **Extended Description**, **Quantity**, **Estimated Unit Price**, **Period**, **Option Number** (if applicable)**, MILSTRIP,** and **Unit of Issue**.

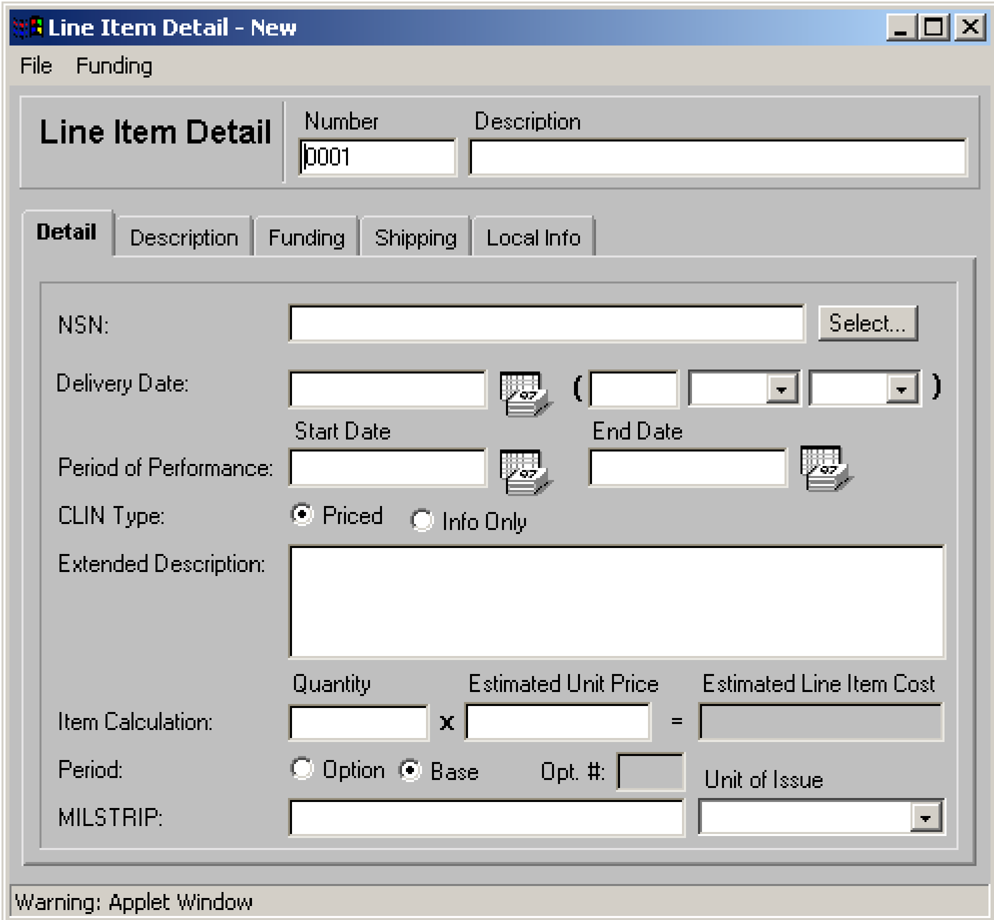

Figure 127: Line Item Detail - New – Detail Tab

1. To associate an NSN with the line item, click the [**Select**] button next to the **NSN** field.

*The **NSN Search** window opens.*

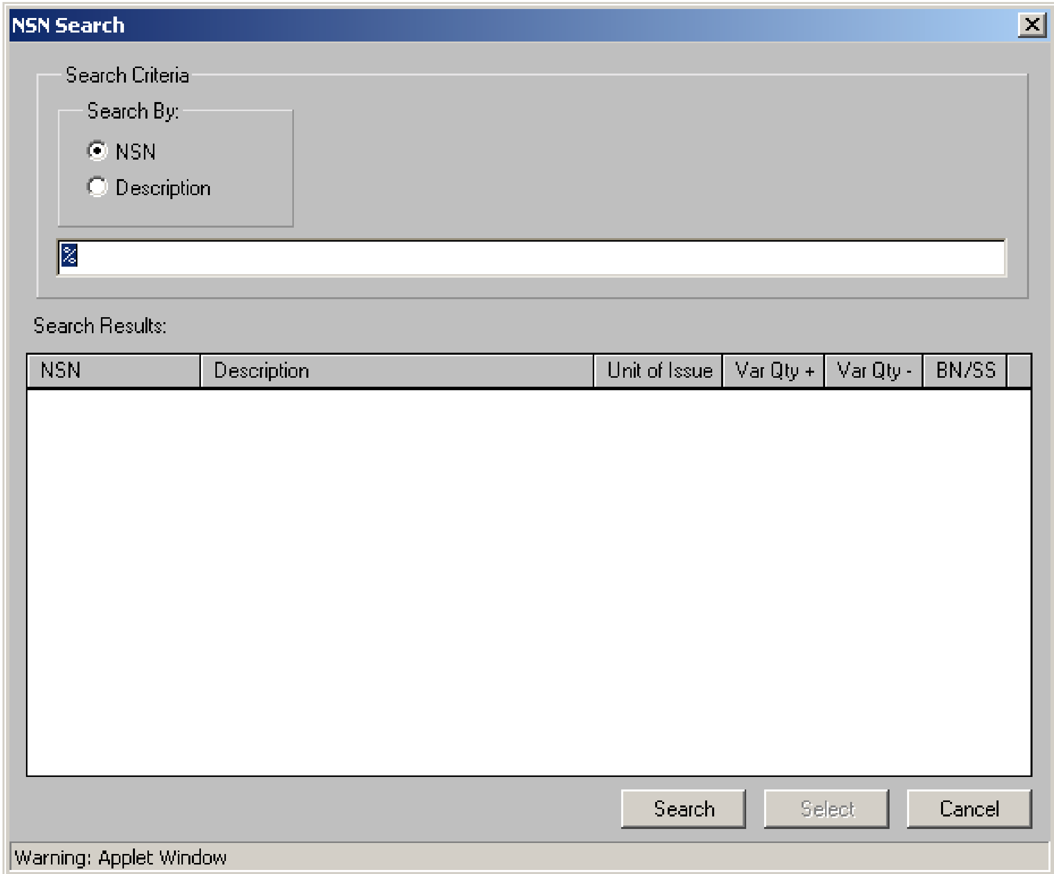

Figure 128: NSN Search Window

2. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information on searches, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

3. Highlight the desired NSN.

4. Click the [**Select**] button.

   *The selected NSN automatically populate the following fields with information from PD²: **NSN**, **Description**, **Extended Description**, **Unit of Issue**, **Var in Qty +**, **Var in Qty –,** and **Brand Name/Sole Source**.*

Note: If no information exists in PD^2 for Variation in Quantity(+),Variation Quantity (-)%, or Brand Name/Sole Source, then the search shall display these fields as blank.

5. There must be a **Delivery Date** or **Period of Performance** entered in order to save the line item.

Note: If the **Priced** radio button is selected, a **Delivery Date** or **Period of Performance** is required. If the **Info Only** radio button is selected, the **Delivery Date** or **Period of Performance** is not required.

a. If the line item requires a specific delivery date, enter it in the **Delivery Date** field manually or use the Auto-Calendar feature.

b. If the line item requires an ADC or AFATA delivery date, select the appropriate units of time from the drop-down list box to the right of the **Delivery Date** field and enter the numeric value in the field on the left.

c. If the line item requires a Period of Performance, enter it in the **Start Date** and **End Date** fields manually in the **Period of Performance** field, or use the Auto-Calendar feature.

Note: Only one date type can be entered, a **Delivery Date** or a **Period of Performance** date.

6. If a PD² user adds multiple delivery information to a PR and return routes that PR to *PRweb*, *PRweb* will display a [**Multiple Deliveries**] button instead of the **Delivery Date** or the **Period of Performance** fields. To see a summary of the multiple delivery information, click on the [**Multiple Deliveries**] button. *PRweb* displays the multiple delivery information in a summary format that is read-only.

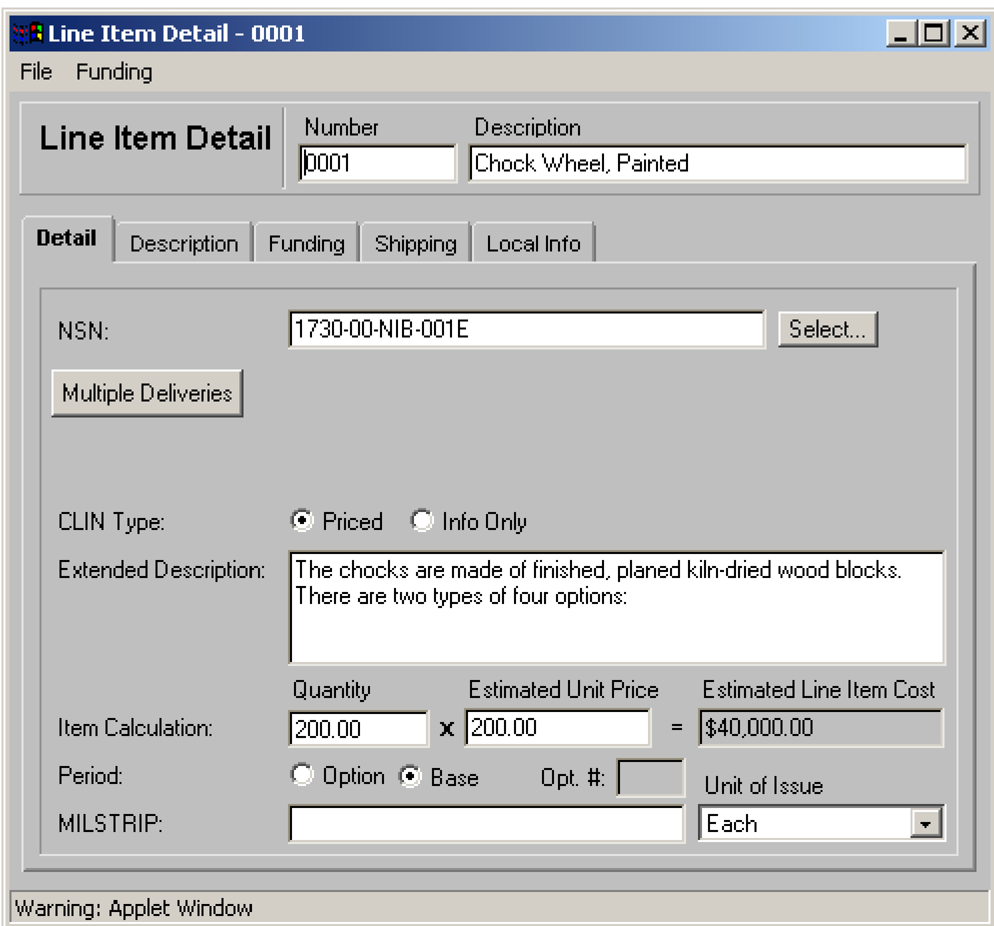

Figure 129: Line Item Detail – 0001 – Detail Tab

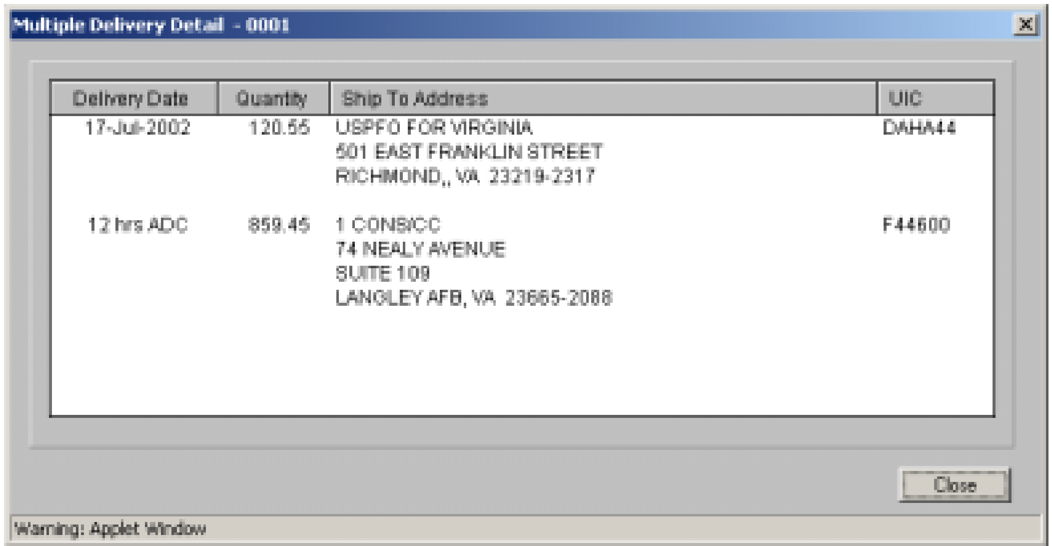

Figure 130: Multiple Delivery Detail - 0001

7. Enter a more detailed description of the line item, if necessary, in the **Extended Description** field.

   This field holds up to 255 characters.

8. Enter a quantity in the **Quantity** field.

9. Enter an amount in the **Estimated Unit Price** field.

   The *PRweb* module automatically calculates the line item cost out to five decimal places. The user must include the quantity in order to save the line item.

Note: A dollar sign is not required when entering the estimated cost of each unit.

10. Select the **Option** or **Base Period** radio button.

11. Enter the appropriate number of days in the **Opt #** field, if it is an option period line item.

    This field holds up to four characters. The specified number of days represents the period's duration in days.

12. Enter the MILSTRIP information in the **MILSTRIP** field if necessary.

    This field holds up to 30 characters.

13. Select the appropriate unit of issue from the **Unit of Issue** drop-down list box.

Description Tab

The *Description* tab in the **Line Item Detail** window allows the *PRweb* user to further specify details pertaining to the line item. The user can include the **Manufacturer**, **Manufacturer Part Number**, **Vendor Number**, **Product/Category Number**, **Drawing Number**, **Specification Number**, **Serial Number**, **Piece Number**, **Model Number**, **Color**, **Size**, **SMIC**, **Positive Variation in Quantity, Negative Variation in Quantity, Project Number**, **FSC** code, **SIC** code, **Brand Name/Sole Source** and **NAICS** code on this tab.

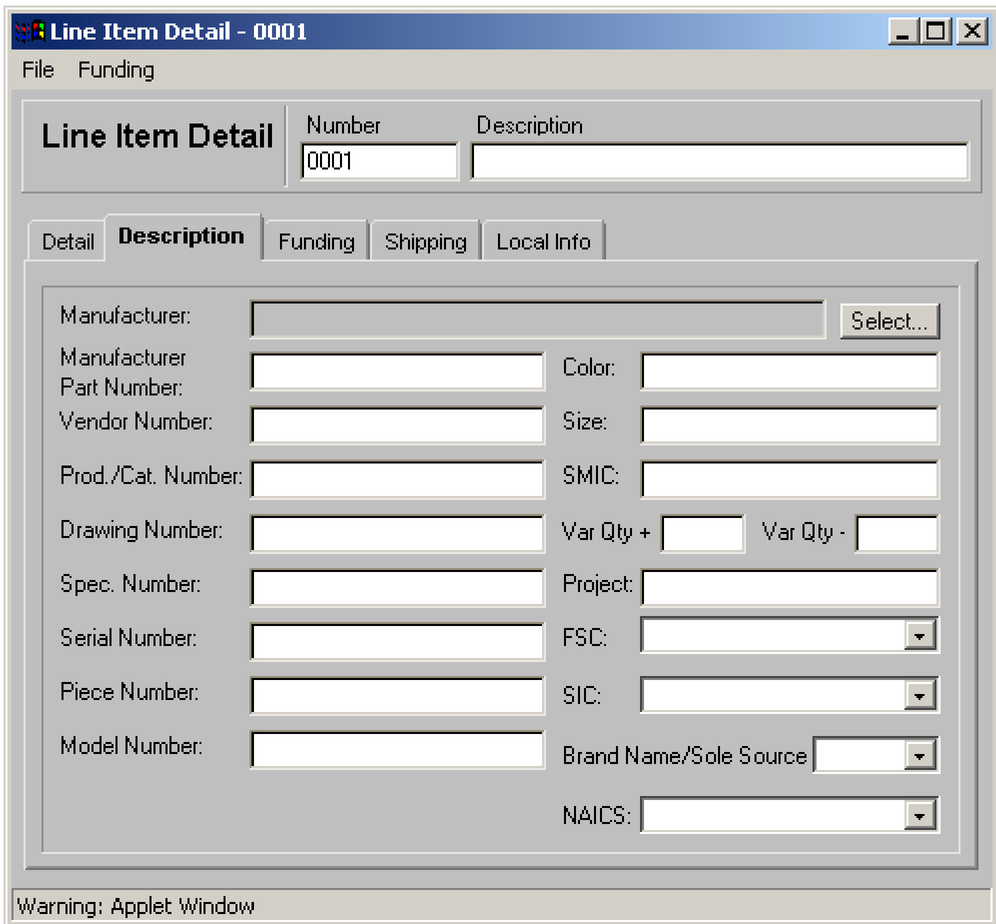

Figure 131: Line Item Detail – New – Description Tab

1. To associate a manufacturer with the line item, click the [**Select**] button next to the **Manufacturer** field.

*The **Vendor Address Search** window opens.*

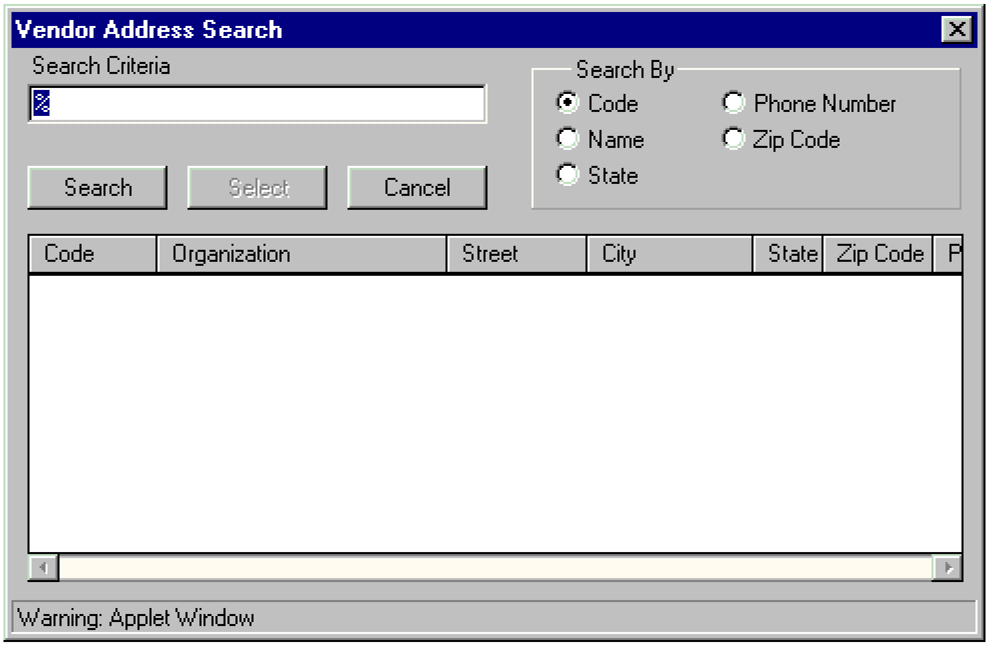

Figure 132: Vendor Address Search Window

2. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information on searches, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

---

3. Highlight the desired manufacturer.

4. Click the [**Select**] button.

   *The selected manufacturer displays in the **Manufacturer** field in the* Description *Tab.*

5. Enter the manufacturer number of the requirement in the **Manufacturer Part Number** field.

   This field holds up to 40 characters.

6. Enter the appropriate vendor number of the requirement in the **Vendor Number** field.

   This field holds up to 40 characters.

7. Enter the product/category number of the requirement in the **Prod./Cat. Number** field.

   This field holds up to 25 characters.

8. Enter the drawing number in the **Drawing Number** field.

   This field holds up to 25 characters.

9. Enter the specification number of the requirement in the **Spec. Number** field.

   This field holds up to 15 characters.

10. Enter the serial number of the requirement in the **Serial Number** field.

This field holds up to 15 characters.

11. Enter the piece number of the requirement in the **Piece Number** field.

    This field holds up to ten characters.

12. Enter the model number of the requirement in the **Model Number** field.

    This field holds up to ten characters.

13. Enter the color of the requirement in the **Color** field.

    This field holds up to 15 characters.

14. Enter the size of the requirement in the **Size** field.

    This field holds up to 30 characters.

15. Enter the Special Material Identification Code (SMIC) of the requirement in the **SMIC** field.

    This field holds up to two characters.

16. Enter the Positive Variation in Quantity of the requirement in the **Var Qty +** field.

    This field holds a number greater than zero and equal or less than 10 with up to 2 decimals.

17. Enter the Negative Variation in Quantity of the requirement in the **Var Qty -** field.

    This field holds a number greater than zero and equal or less than 10 with up to 2 decimals.

18. Enter the project number/description of the requirement in the **Project** field.

    This field holds up to ten characters.

19. Select the Federal Supply Classification (FSC) code from the **FSC** drop-down list box.

20. Select the Standard Industrial Classification (SIC) code from the **SIC** drop-down list box.

21. Select the Brand Name/Sole Source from the **Brand Name/Sole Source** drop-down list box.

22. Select the North American Industry Classification Standards (NAICS) code from the **NAICS** drop-down list box.

Funding Tab

The *PRweb* module provides the ability to add funding at the line item level or assign contract level funding. For more information on contract level funding, refer to *Chapter 4: Purchase Request*. The user can add line item level funding from within the **Line Item Detail** window. The *Funding* tab displays line item funding information. The cumulative amount of funding automatically displays on the *Line Item* tab of the PR. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only.

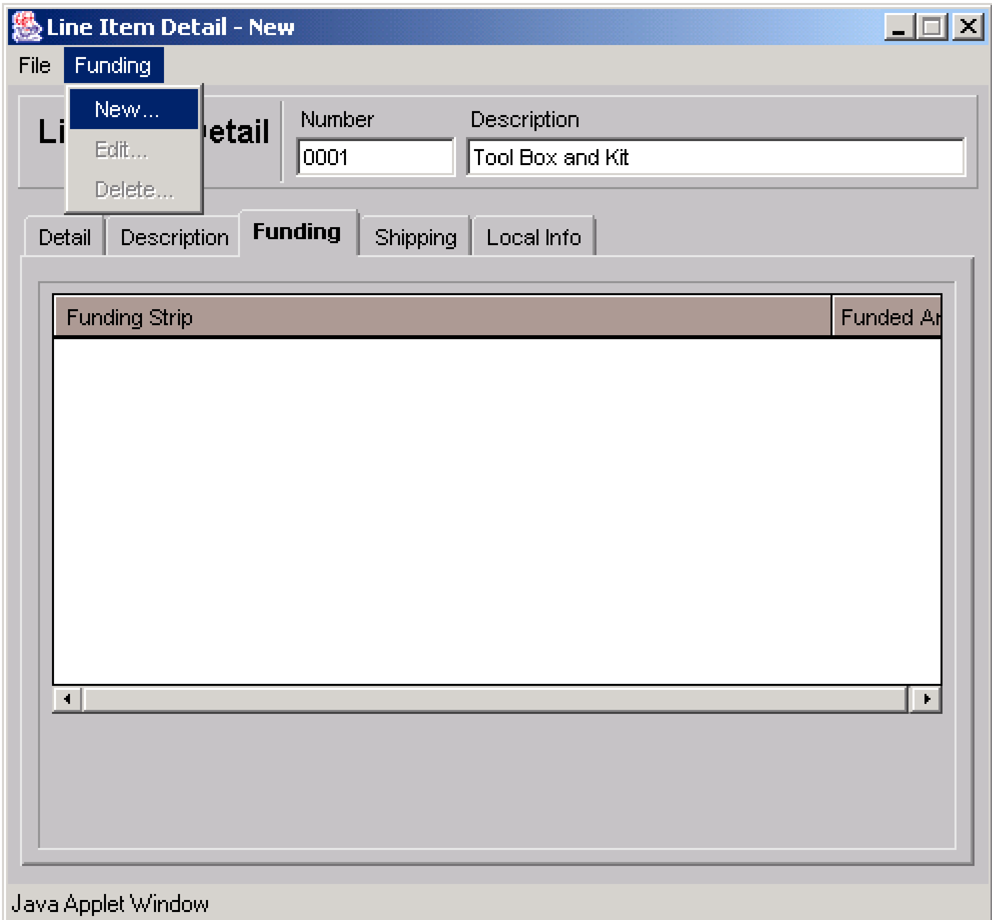

Figure 133: Line Item Detail - New – Funding Tab

Creating a New Funding Source

PRweb users can create funding sources at the contract level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only.

1. From the menu, select **Funding → New**.

   *The **Funding Sources – New** window opens with the funding header displayed at the top.*

   The funding header includes the **Number**, **Description,** and the **Total Estimated Cost** of the line item. The data contained in these fields is retrieved from the *Detail* tab.

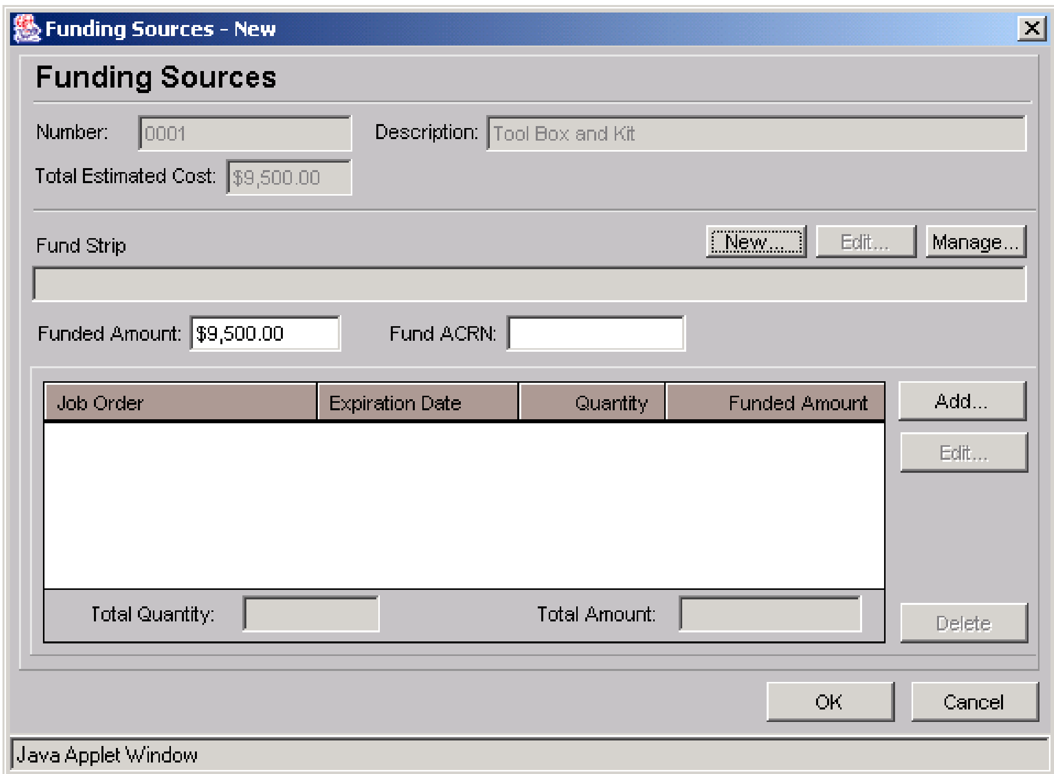

Figure 134: Funding Sources – New Window

2. To search for an existing funding strip, click the [**Manage**] button.

*The **Funding Strip Search** window opens.*

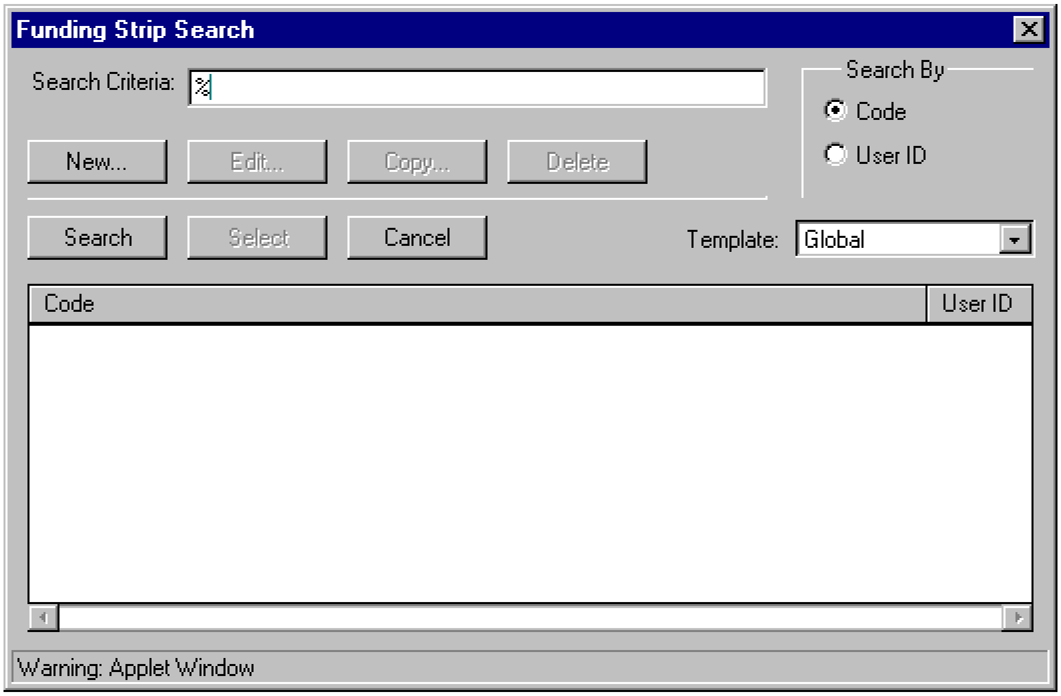

Figure 135: Funding Strip Search Window

3. Select the appropriate template from the **Template** drop-down list box.

Note: Selecting “Global” in the **Template** drop-down list box searches across all templates.

4. Enter **Search Criteria**, and click the [**Search**] button.

The search results display.

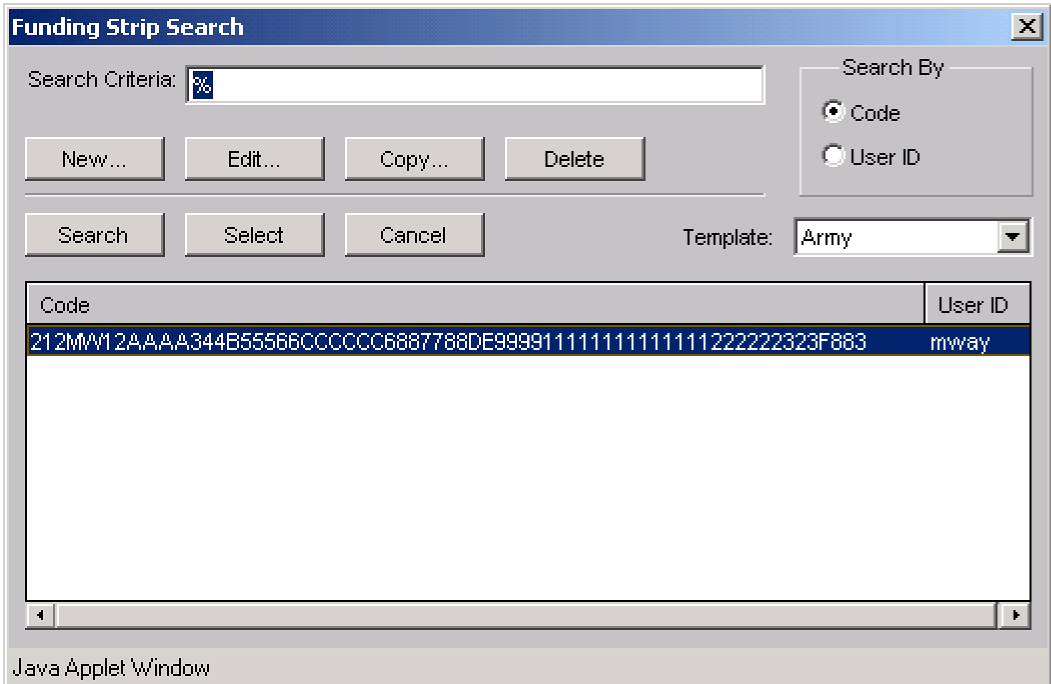

Figure 136: Funding Strip Search Window

Note: Only funding strips that have been created by the user or released by the PD² System Administrator are displayed.

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5. If the desired funding strip is not found, skip to step 8. If it is found, continue with step 6.
6. Highlight the desired funding strip and click the [**Select**] button.
7. Skip to step 13.

Note: For more information on searches, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

---

8. If the funding strip is not found, click the [**New**] button.

The ***<Default Template> Funding Strip – New*** *window opens.*

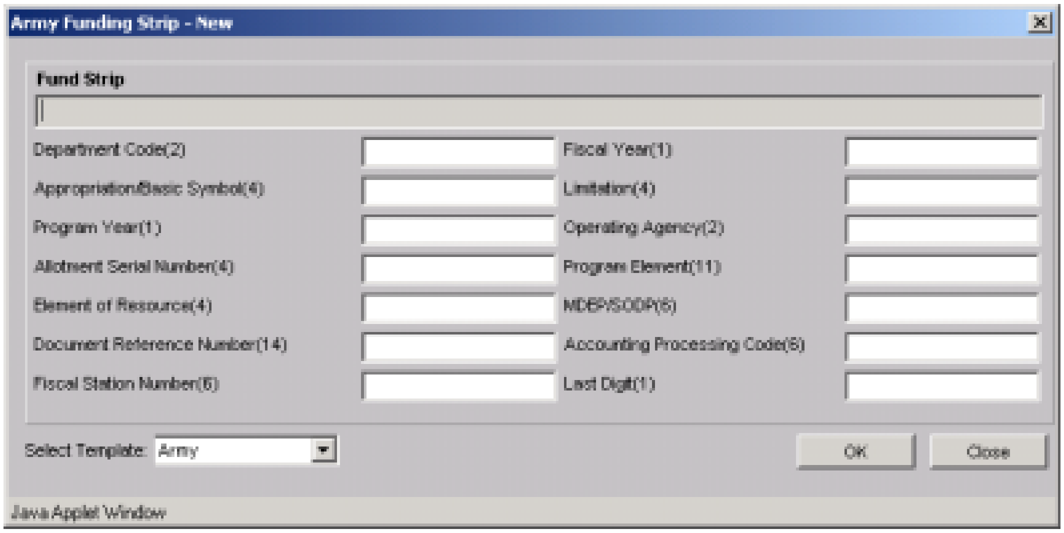

Figure 137: Army Funding Strip - New Window

Note: The default funding strip template set by the System Administrator displays. If the System Administrator has not selected a default template, you cannot continue.

9. To change to an alternate template, select another template from the **Select Template** drop-down list box.

10. Enter the funding strip information in the appropriate fields.

Note: Each field must either be filled out completely or left blank.

11. Click [**OK**].

    The funding strip displays on the list of available funding strips in the ***Funding Strip Search*** *window.*

12. Highlight the new funding strip and click the [**Select**] button to select the new funding strip.

13. Enter the appropriate fund amount in the **Funded Amount** field.

    The **Funded Amount** field allows the *PRweb* user to enter the desired dollar amount to correspond with the selected funding strip. (It is not required to enter a dollar sign.)

Note: The **Funded Amount** defaults to the total cost of the line item.

14. Enter an ACRN in the **Fund ACRN**.

    The **Fund ACRN** field allows users to enter ACRN information in the **Funding Source** window. This field holds up to two characters.

15. Click [**OK**] to save.

Note: The PR must be saved to save the new funding source.

Editing a Funding Source

PRweb users can edit funding sources at the contract level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only.

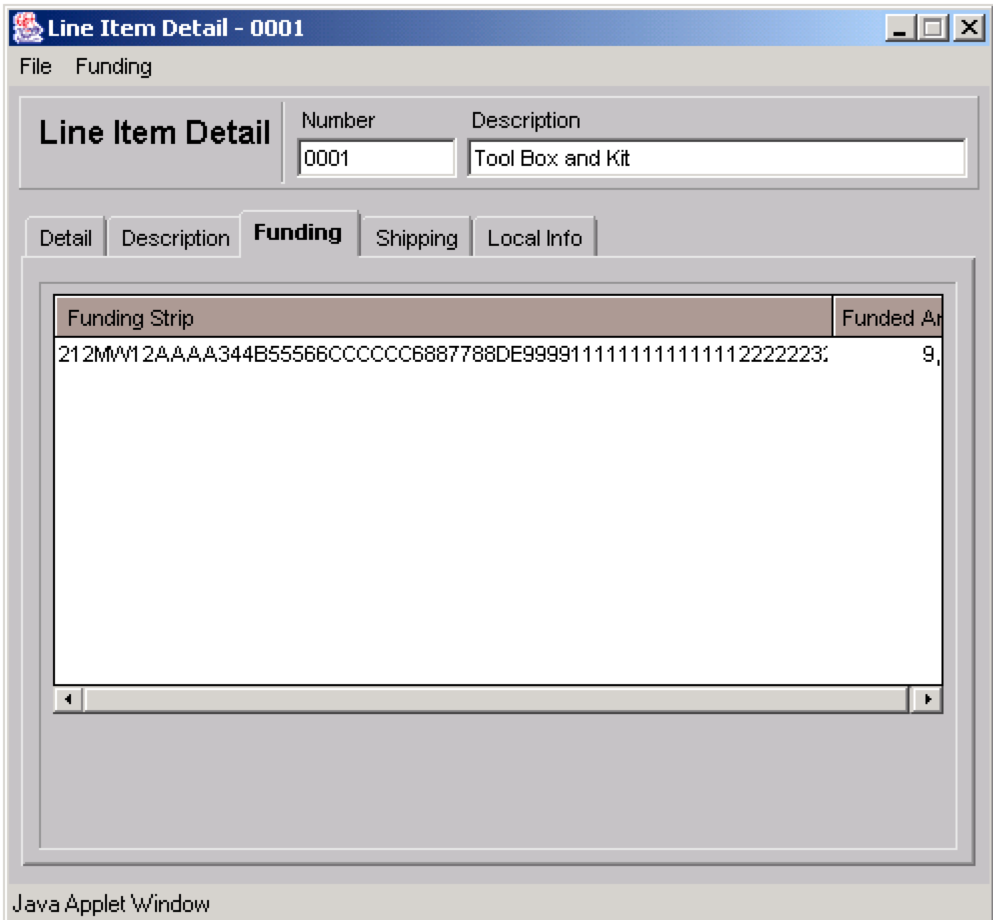

Figure 138: Line Item Detail - <Line Item Number> - Funding Tab

1. From the *Funding* tab of the **Line Item Detail** window, highlight the funding source to be edited.

2. From the menu, select **Funding → Edit**.

Note: The *PRweb* user can also double-click on the funding source to open the highlighted funding source.

*The **Funding Sources** window opens.*

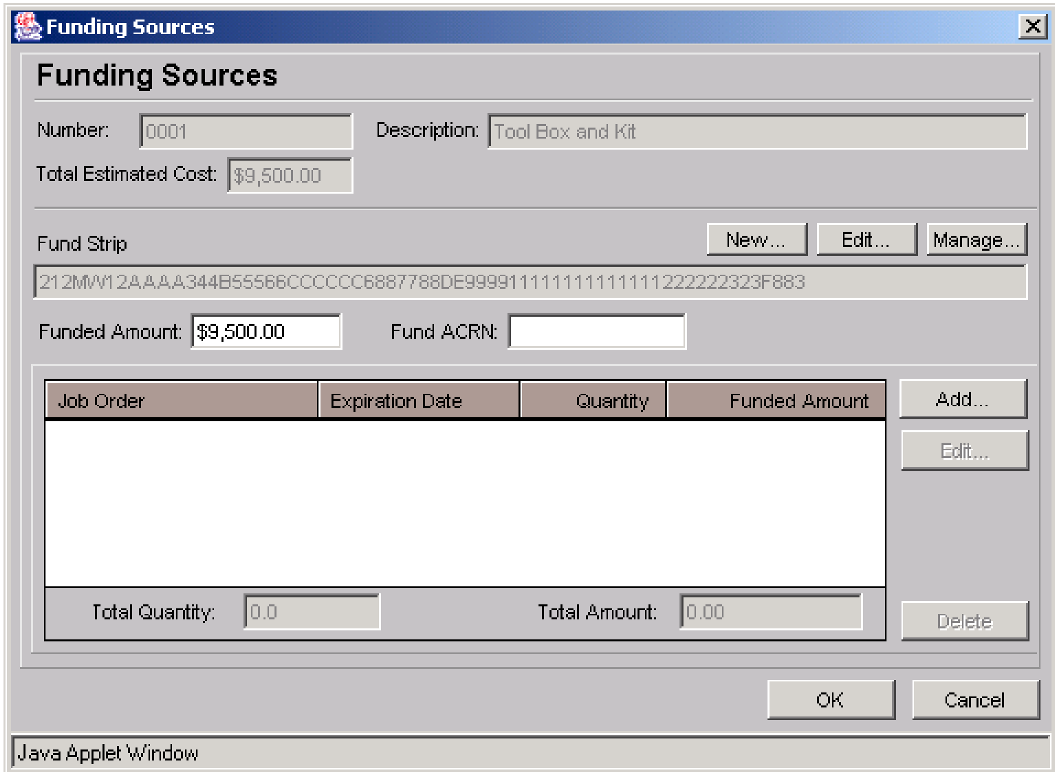

Figure 139: Funding Sources Window

3. Make desired changes and click [**OK**] to return to the **Line Item Detail** window.

4. From the menu, select **File → Update** to update the line item with the funding information.

Note: The PR must be saved to save the new funding source.

Deleting a Funding Source

PRweb users can delete funding sources at the contract level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only.

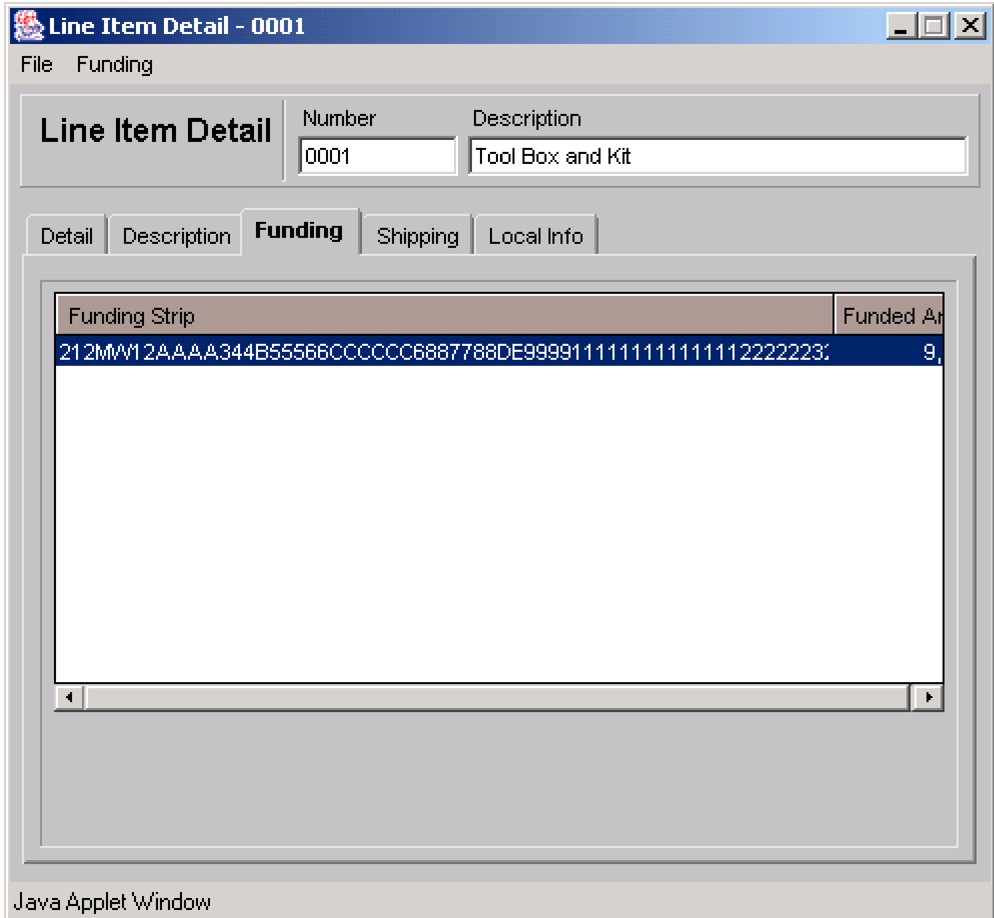

Figure 140: Line Item Detail - <Line Item Number> - Funding Tab

1. From the *Funding* tab of the **Line Item Detail** window, highlight the funding source to be deleted.

2. From the menu, select **Funding → Delete**.

3. Click the [**Yes**] button in the **Confirmation** window.

   The Funding *tab displays with the funding source deleted from the table.*

4. From the menu, select **File → Update** to update the line item with the funding information.

Note: The PR must be saved to save the funding source.

Creating a New Funding Strip

PRweb users can create funding strips at the line item level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only.

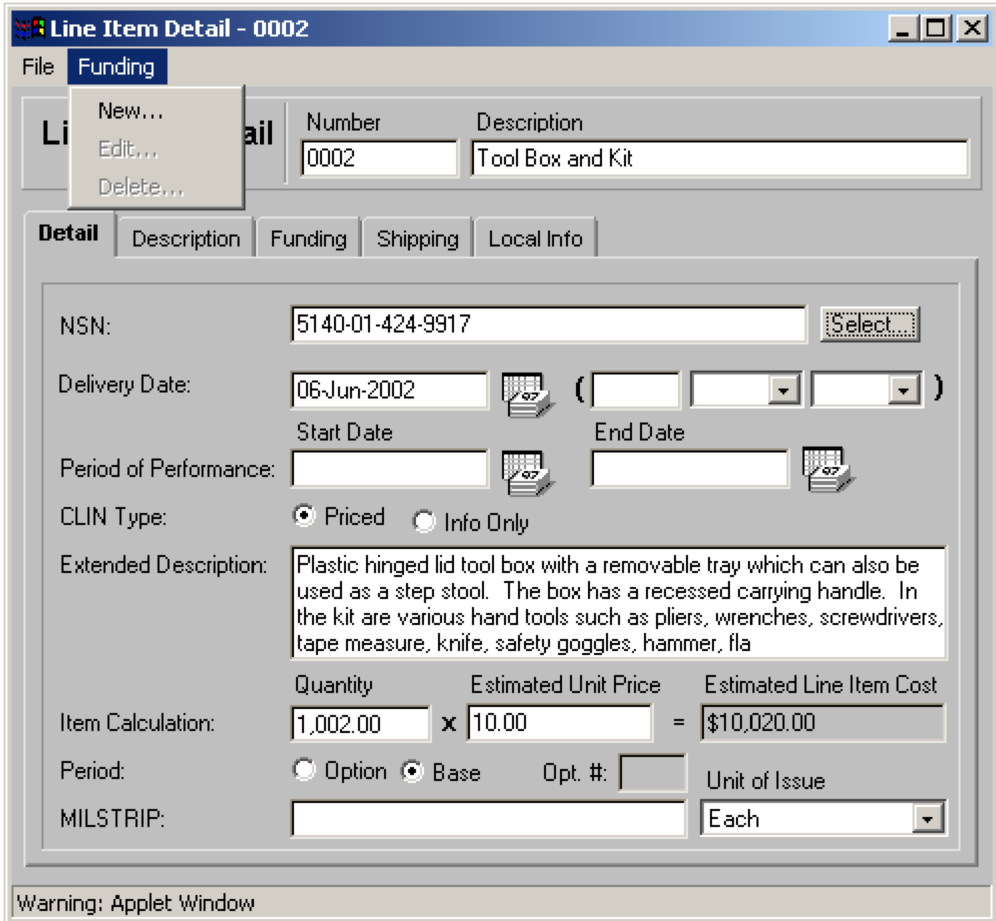

Figure 141: Line Item Detail – New Window

1. From the menu, select **Funding** → **New**.

*The **Funding Sources – New** window opens.*

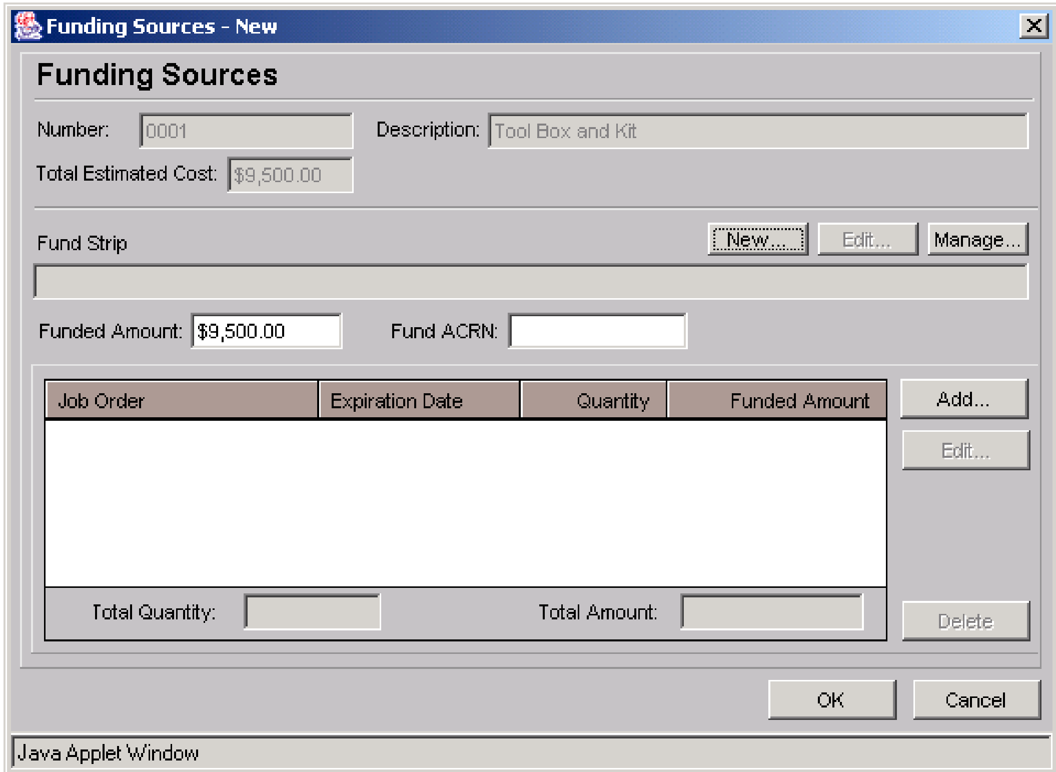

Figure 142: Funding Sources – New Window

2. Click the [**New**] button.

   *The **<Default Template> Funding Strip – New** window opens.*

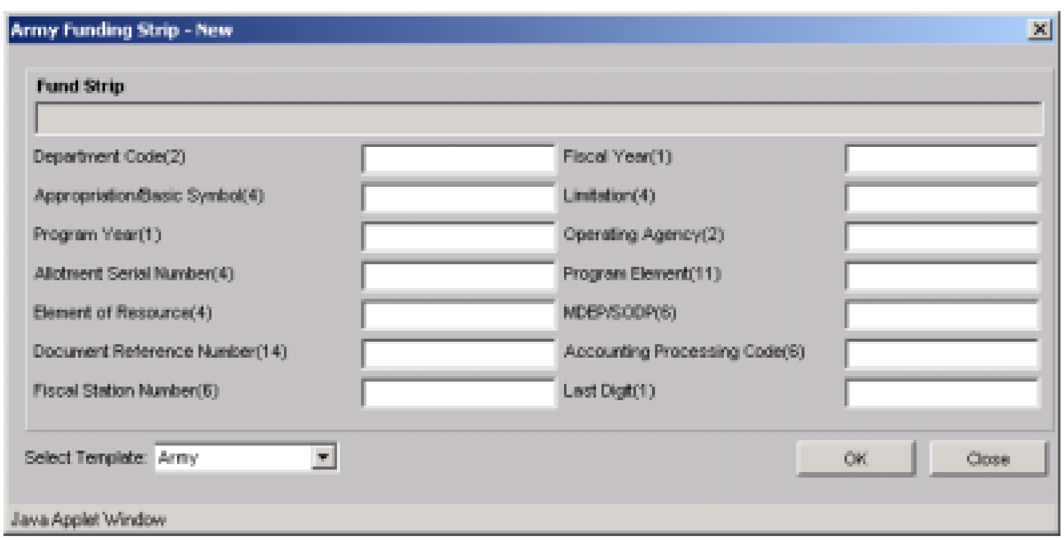

Figure 143: Army Funding Strip – New Window

3. To change an alternate template, select another template from the **Select Template** drop-down list box.

4. Enter the funding strip information in the appropriate fields.

Note: Each field must either be filled out completely or left blank. However some fields may be required, depending on how the System Administrator configured the funding template.

5. Click [**OK**].

   *The funding strip displays in the **Fund Strip** field of the **Funding Sources - New** window.*

6. Click [**OK**] to return to the **Line Item Detail** window.

7. From the menu, select **File → Update** to update the line item with the funding information.

Note: A new funding strip may also be created from the **Funding Strip Search** window by clicking the [**New**] button.

Note: The PR must be saved to save the new funding strip.

Copying a Funding Strip

PRweb users can copy funding strips at the line item level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only.

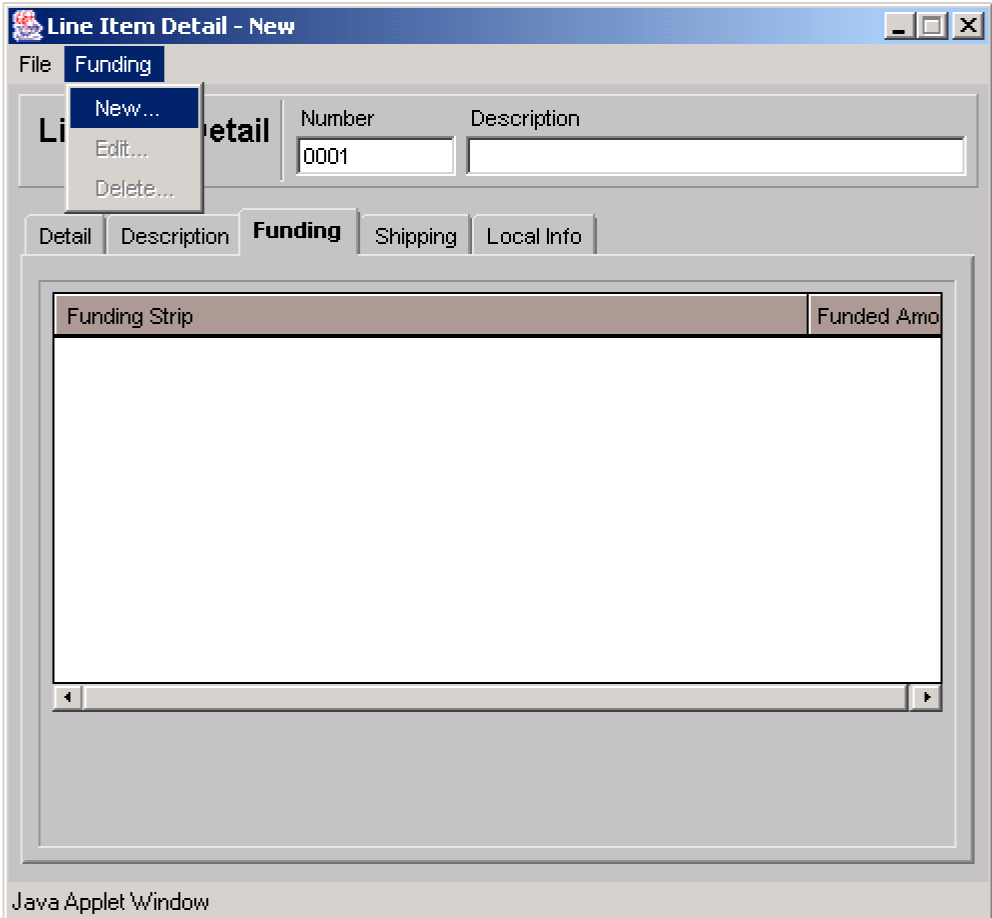

Figure 144: Line Item Detail – New – Funding Tab

1. From the menu, select **Funding → New**.

*The **Funding Sources – New** window opens.*

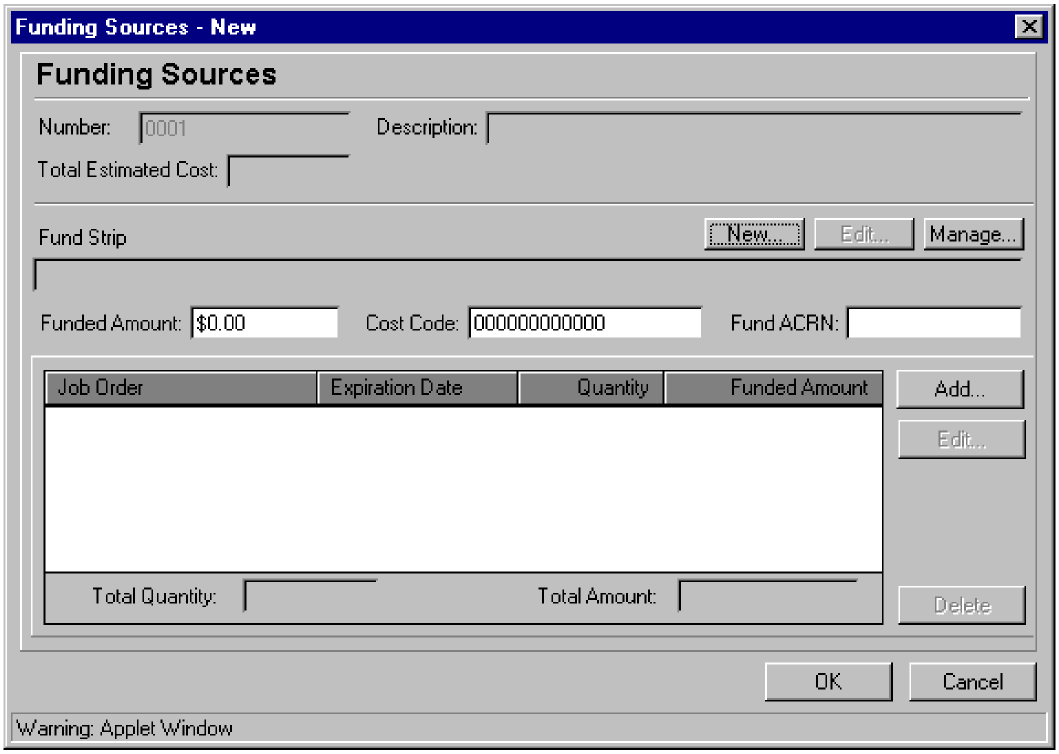

Figure 145: Funding Sources – New Window

2. Click the [**Manage**] button.

   *The **Funding Strip Search** window opens.*

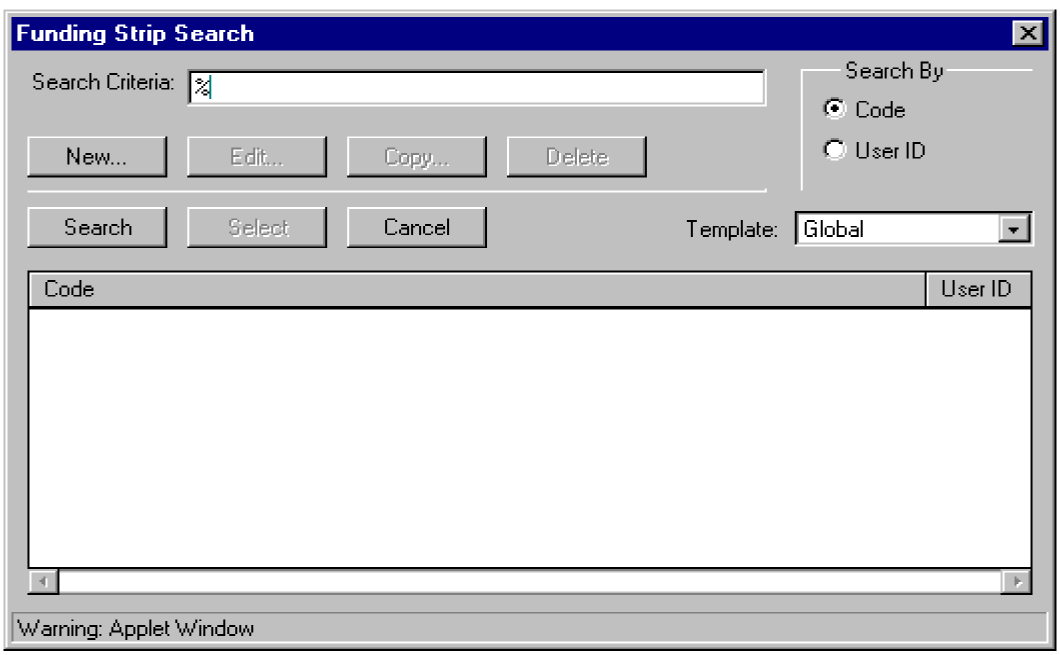

Figure 146: Funding Strip Search Window

3. Select the appropriate template from the **Template** drop-down list box.

4. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information regarding searches, refer to the "Search Function" section in *Chapter 2: PRweb Desktop*.

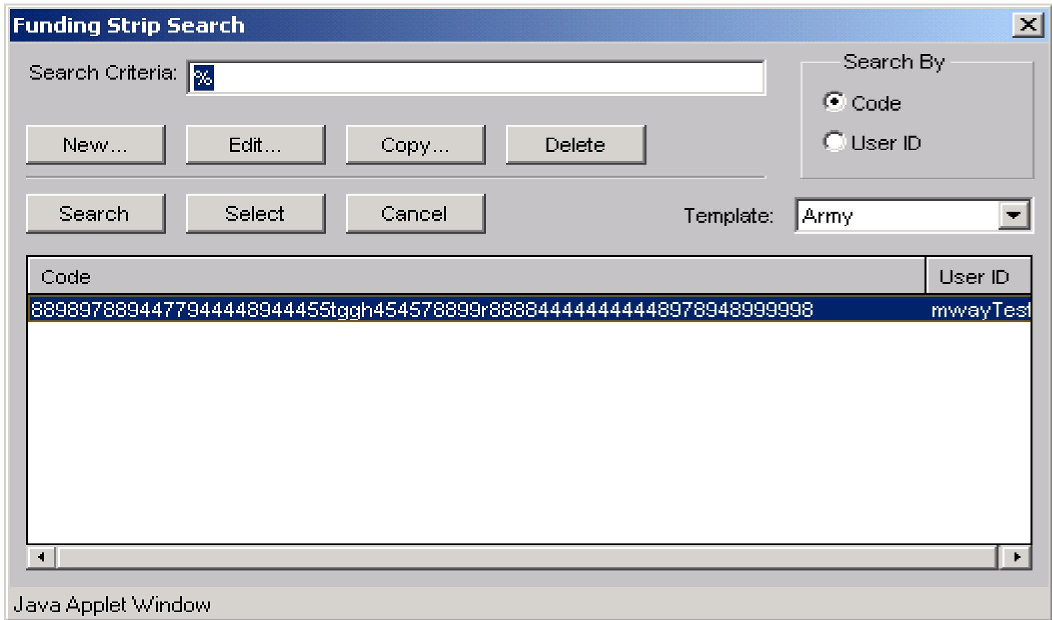

Figure 147: Funding Strip Search Window

5. Highlight the desired funding strip and click the [**Copy**] button.

   The ***<Default Template> Funding Strip - Copy*** *window opens with the copied funding strip information in each field.*

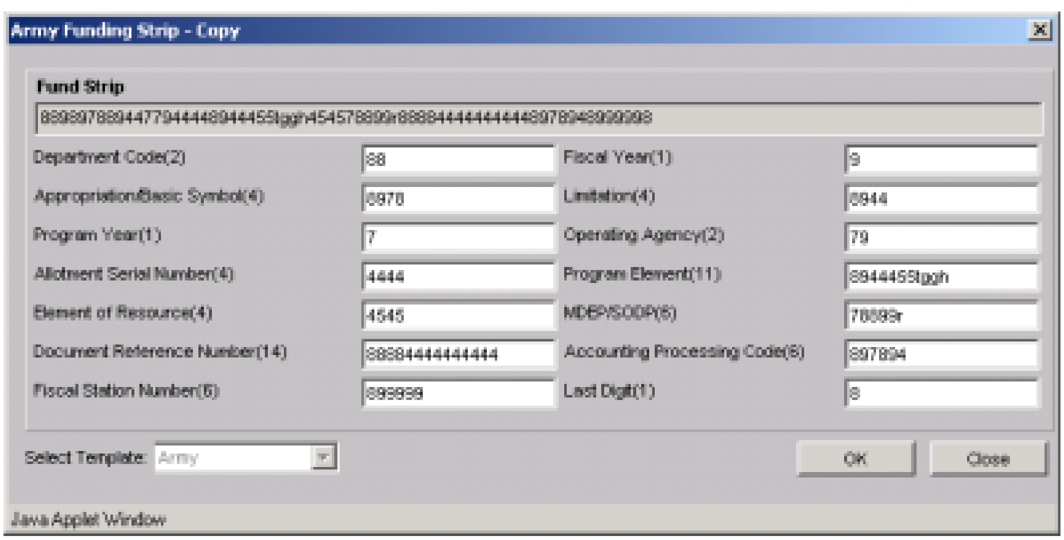

Figure 148: Army Funding Strip – Copy Window

Note: The funding strip is copied into the template that corresponds with the *PRweb* template used to create the original funding strip. If the funding strip was created with a *PRweb* template that has either been disabled or updated, the PRweb user is unable to copy the funding strip. In addition, funding strips that were routed from PD^2 will display as Miscellaneous.

6. Make the desired changes to the funding strip.
7. Click [**OK**] to save the changes and return to the **Funding Strip Search** window.

   *The new funding strip displays in the **Funding Strip Search** window.*

8. Highlight the funding strip and click the [**Select**] button to select the new funding strip.
9. Click [**OK**] to return to the *Funding* tab of the **Line Item Detail** window.
10. From the menu, select **File → Update** to update the line item with the new funding information.

Note: The PR must be saved to save the edited funding strip.

Editing a Funding Strip

PRweb users have two options for editing funding strips at the line item level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only.

If the System Administrator has updated or removed the template from which the selected funding strip was created from, *PRweb* alerts the user that the template has changed.

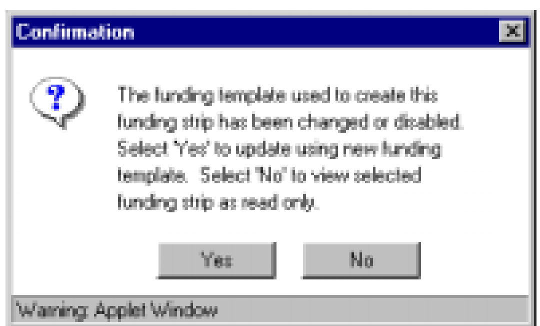

Figure 149: Confirmation Window

If the user selects [**Yes**], the *PRweb* user is able to create a new funding strip using the updated version of the template or specify another template.

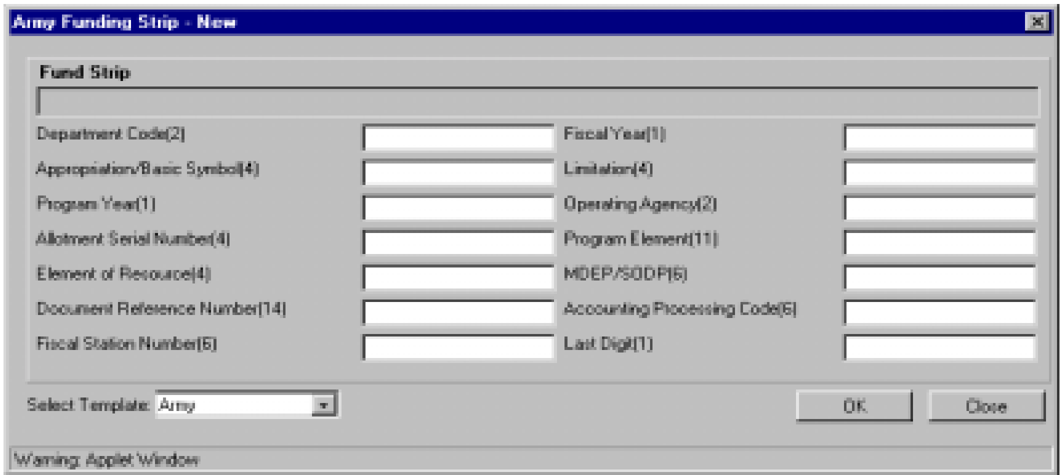

Figure 150: Army Funding Strip – New Window

If the user selects [**No**], the funding strip displays as read-only.

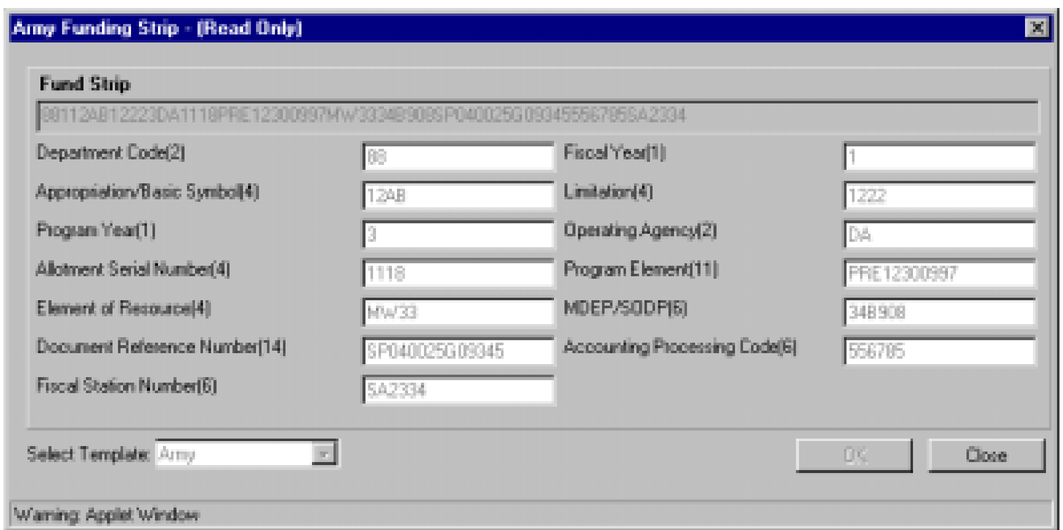

Figure 151: Army Funding Strip – (Read Only) Window

Option 1: By Funding Strip Search

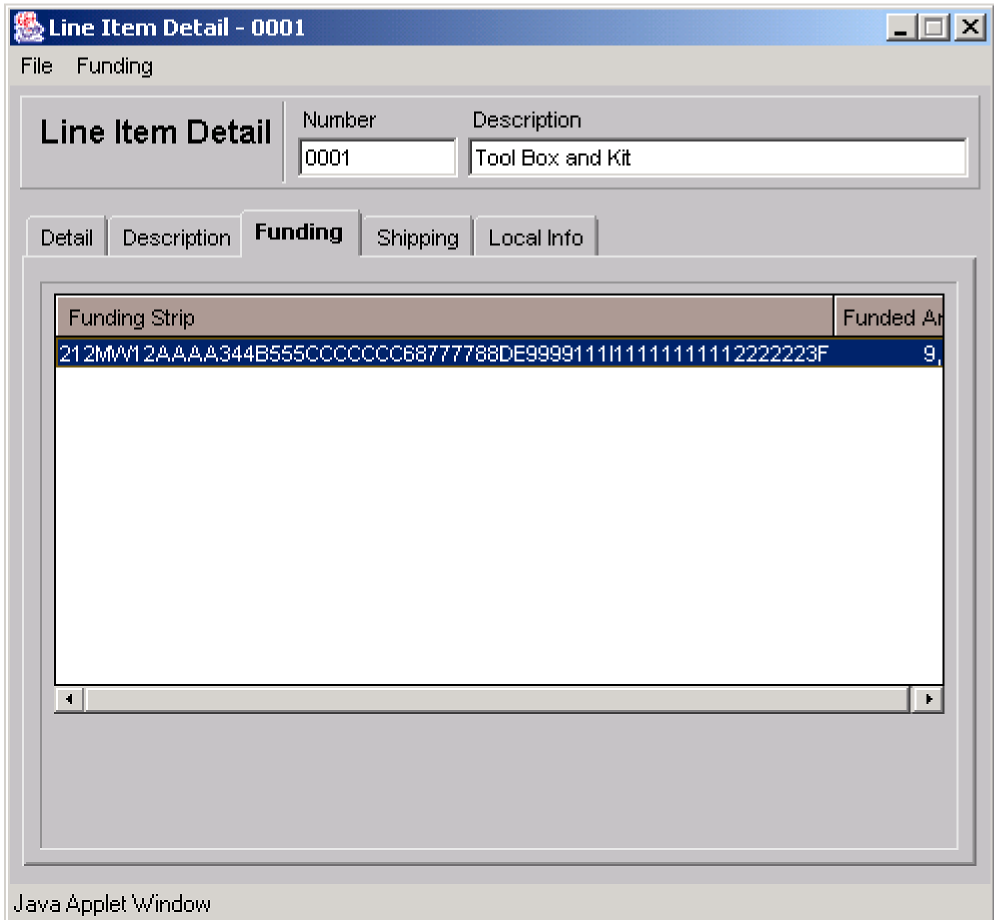

Figure 152: Line Item Detail - <Line Item Number> - Funding Tab

1. Highlight the funding source to be edited.

2. From the menu, select **Funding → Edit**.

*The **Funding Sources** window opens.*

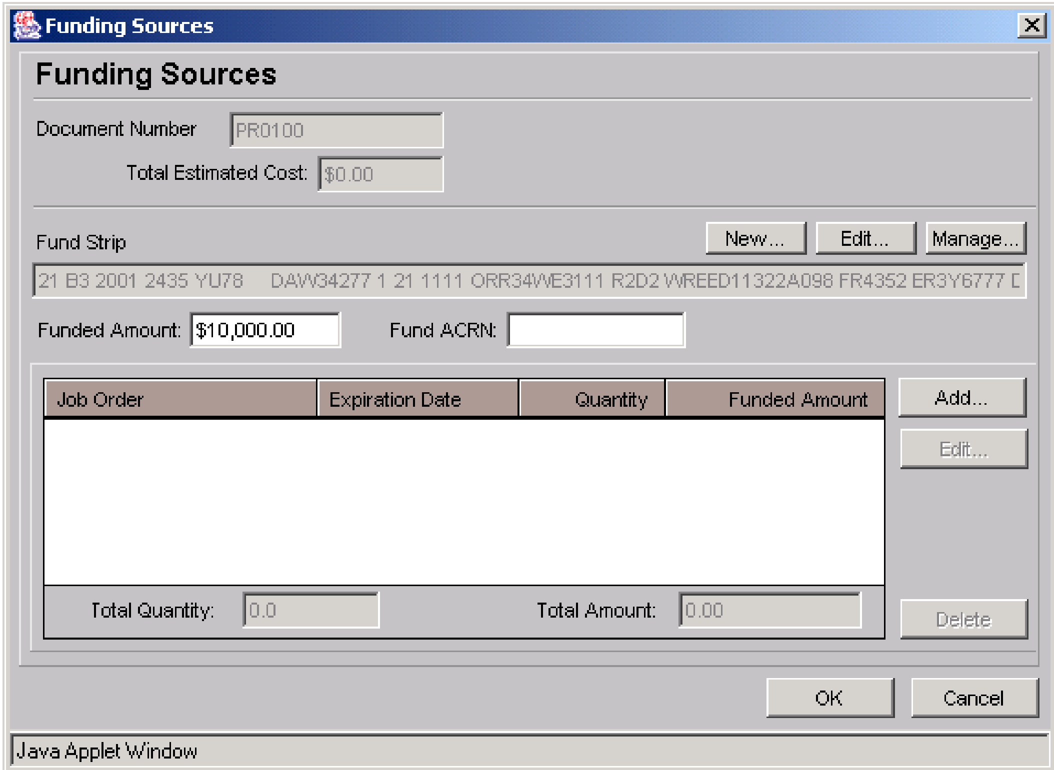

Figure 153: Funding Sources Window

3. Click the [**Manage**] button.

*The **Funding Strip Search** window opens.*

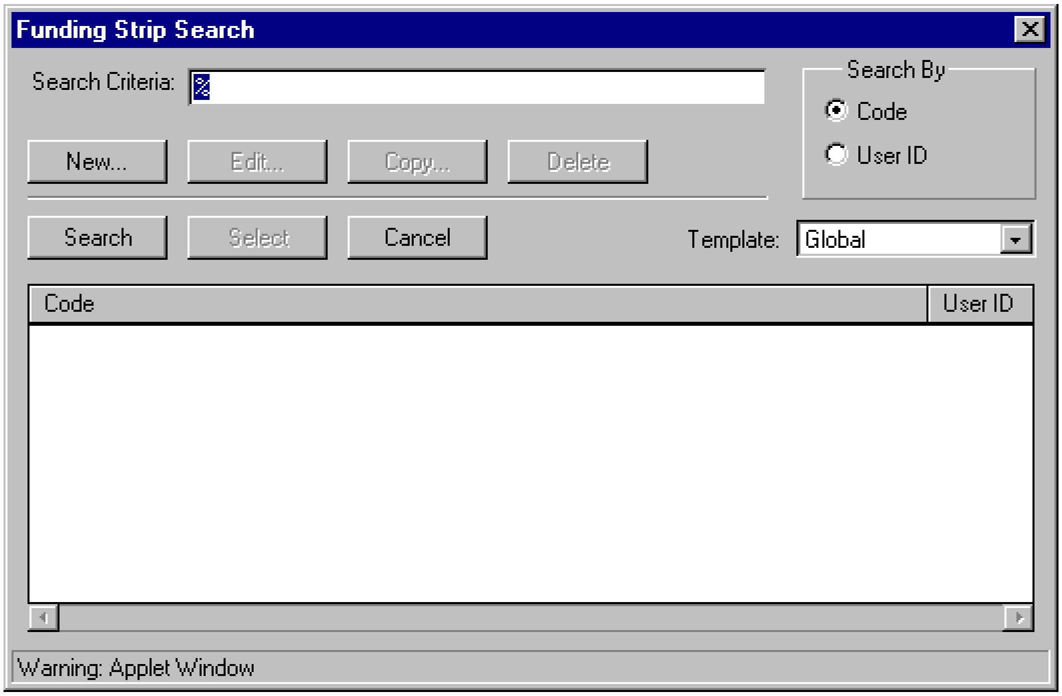

Figure 154: Army Funding Strip – Edit Window

4. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information regarding searches, refer to the 'Search Function" section in *Chapter 2: PRweb Desktop*.

---

5. Highlight the desired funding strip and click the [**Edit**] button.

The ***Army Funding Strip – Edit*** *window opens with the original funding information displayed.*

Note: You may not edit a funding strip that is applied to either another PR or another funding source on the same PR.

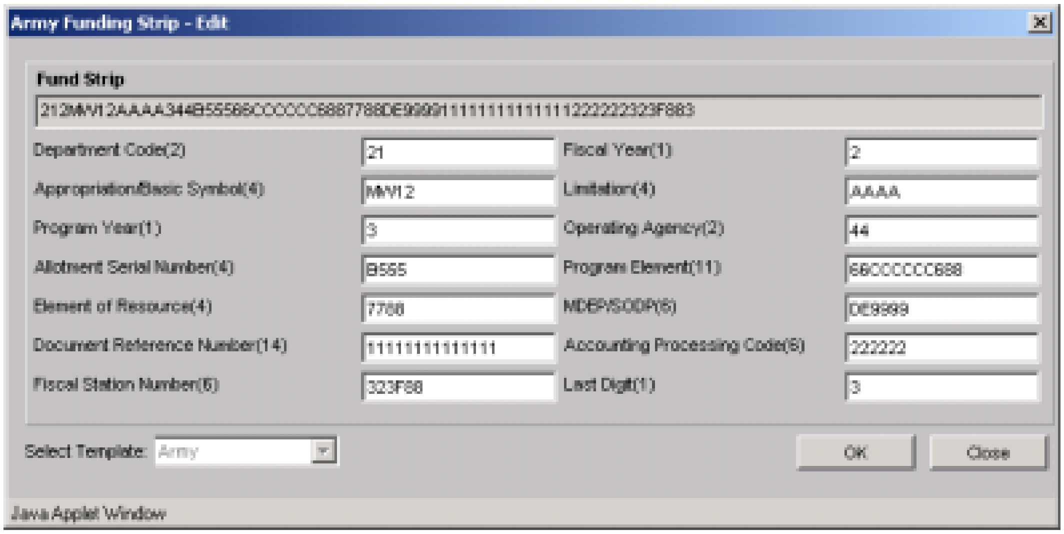

Figure 155: Army Funding Strip – Edit Window

6. Make desired changes to the funding strip and click [**OK**] to return to the **Funding Strip Search** window.

7. Click the [**Select**] button to select the updated funding strip and return to the **Funding Sources** window.

8. Click [**OK**] to return to the *Funding* tab of the **Line Item Detail** window.

9. From the menu, select **File → Update** to update the line item with the new funding information.

Note: The PR (or PR Mod) must be saved to save the edited funding strip.

Option 2: By Funding Sources Window

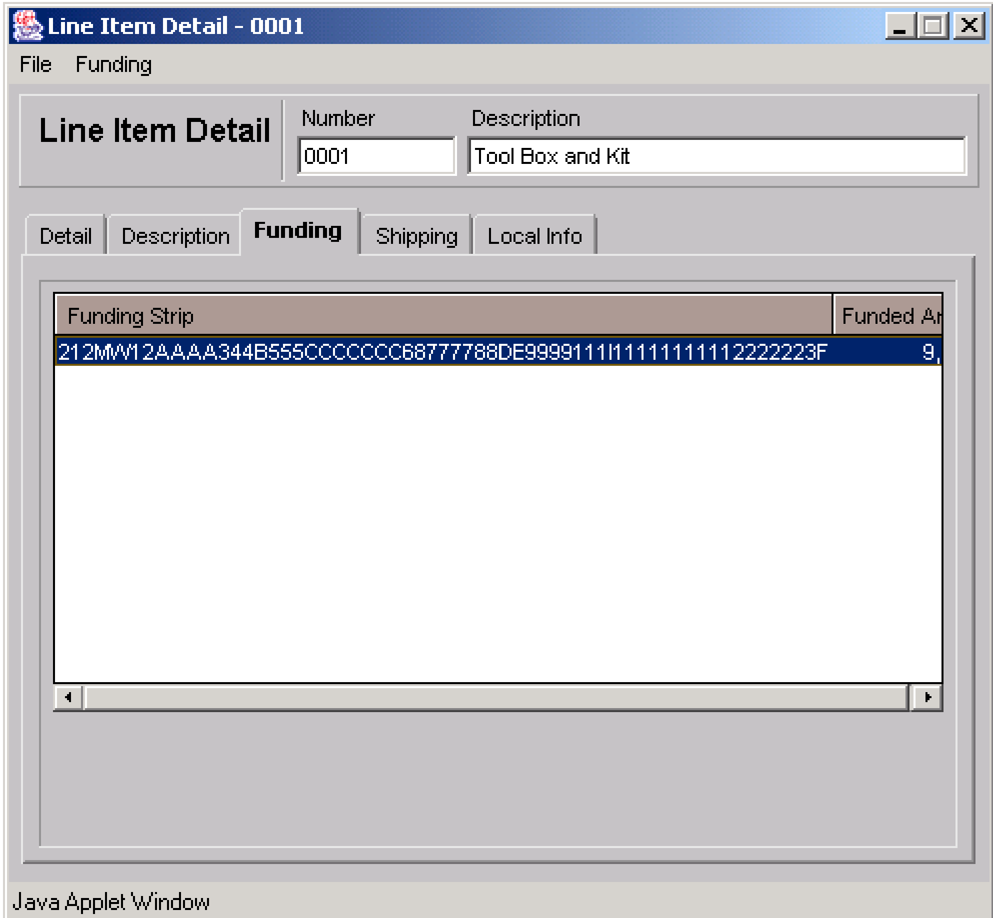

Figure 156: Line Item Detail - <Line Item Number> - Funding Tab

1. Highlight the desired funding source.
2. From the menu, select **Funding → Edit**.

*The **Funding Sources** window opens.*

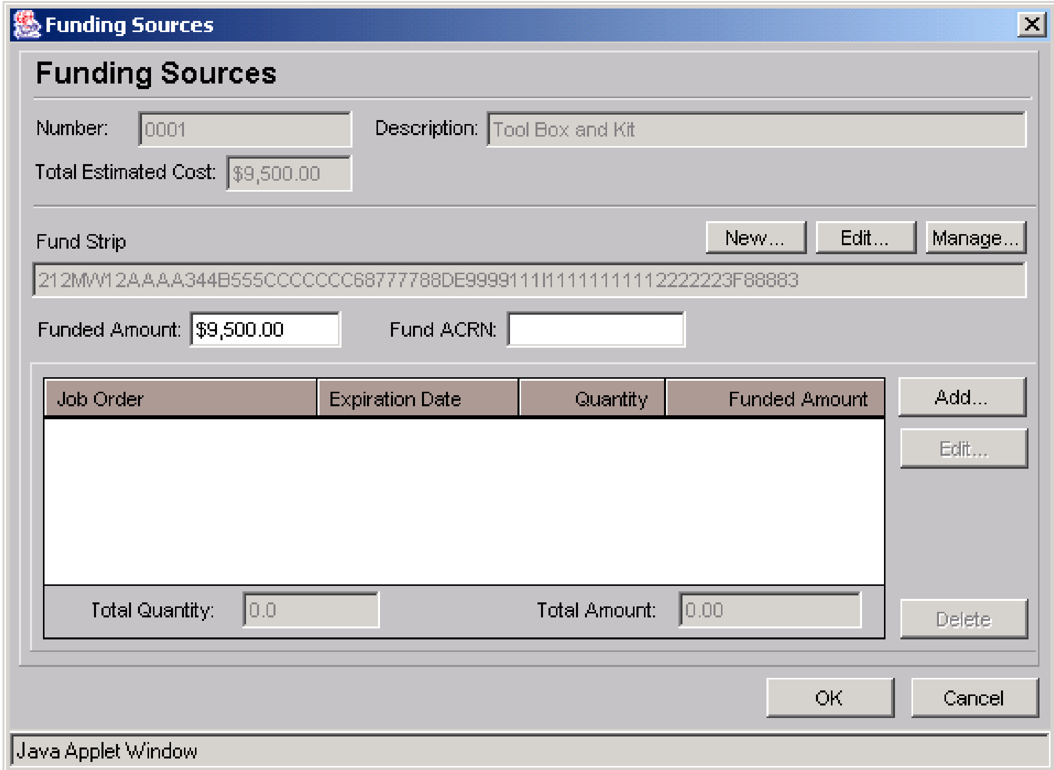

Figure 157: Funding Sources Window

3. From the **Funding Sources** window click the [**Edit**] button next to the **Fund Strip** field.

   *The **Funding Strip – Edit** window opens with the original funding information displayed.*

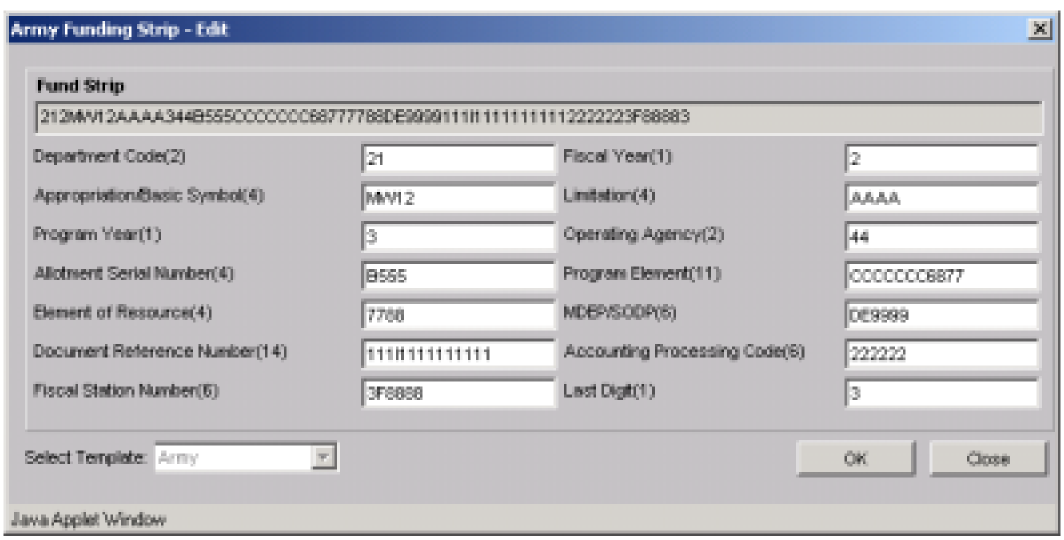

Figure 158: Army Funding Strip – Edit Window

4. Make desired changes to the funding strip and click [**OK**] to return to the **Funding Sources** window.

5. Click [**OK**] to return to the *Funding* tab of the **Line Item Detail** window.

6. From the menu, select **File → Update** to update the line item with the new funding information.

Note: The PR must be saved to save the edited funding strip.

Deleting a Funding Strip

PRweb users can delete funding strips at the line item level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding information is read-only.

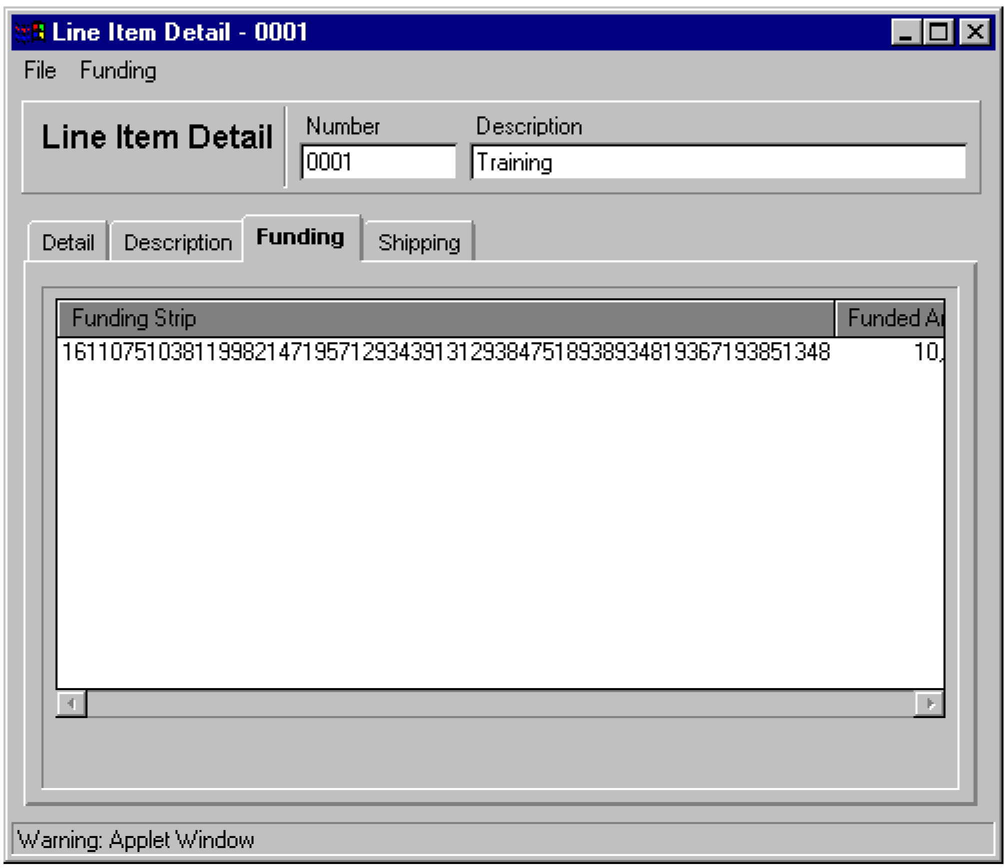

Figure 159: Line Item Detail – <Line Item Number> - Funding Tab

1. Highlight the desired funding source.

2. From the menu, select **Funding → Edit**.

*The **Funding Sources** window opens.*

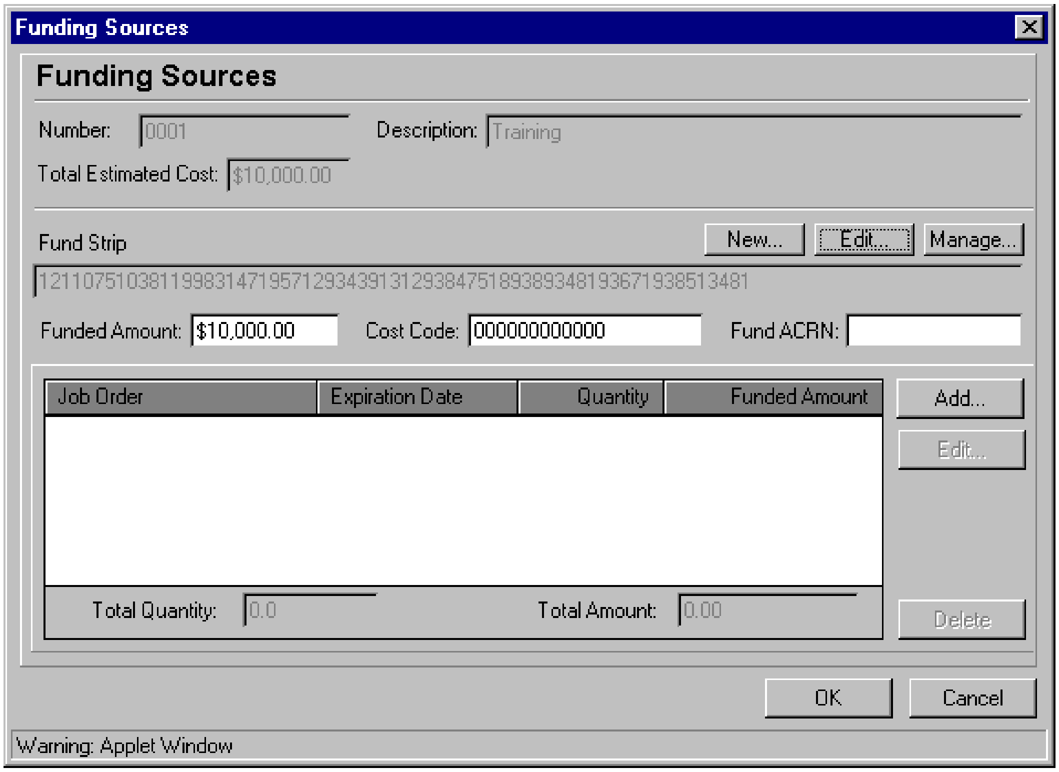

Figure 160: Funding Sources Window

3. Click the [**Manage**] button.

*The **Funding Strip Search** window opens.*

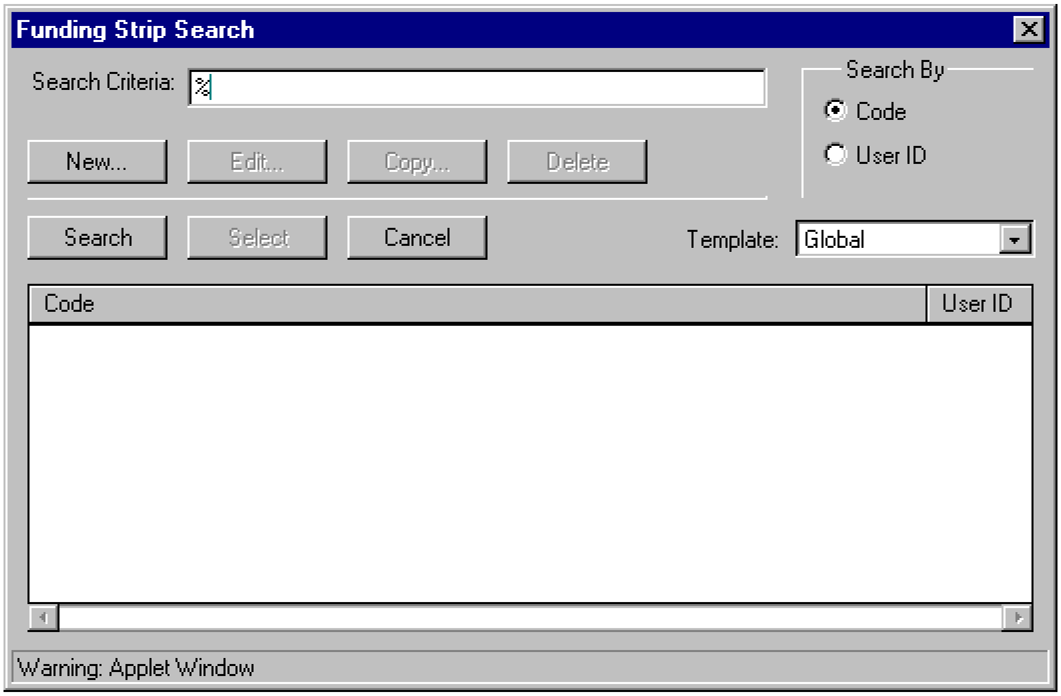

Figure 161: Funding Strip Search Window

4. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information regarding searches, refer to the "Search Function" section in *Chapter 2: PRweb Desktop*.

---

5. Highlight the desired funding strip and click the [**Delete**] button.

Note: You may not delete a funding strip that is applied to another PR, a line item on the same PR or the same line item on a different funding source.

---

6. Click the [**Yes**] button in the **Confirmation** window.

   *The **Funding Strip Search** window displays with the funding strip deleted from the table.*

7. Click the [**Cancel**] button to return to the **Funding Sources – New** window.

8. Click [**OK**] to return to the *Funding* tab of the **Line Item Detail** window.

9. From the menu, select **File → Update** to update the funding information.

Note: The PR must be saved to save the funding information.

Creating a Job Order

PRweb users can create job orders at the contract level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding and job order information is read-only.

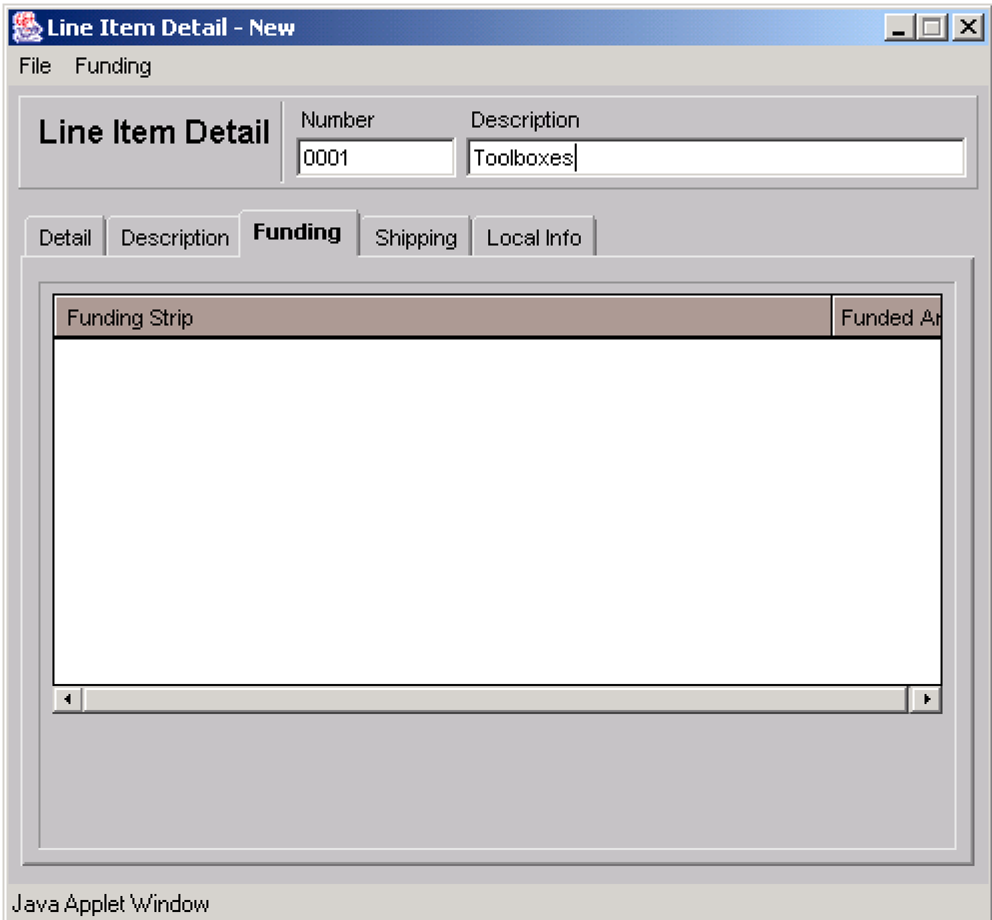

Figure 162: Line Item Detail – New – Funding Tab

1. From the menu, select **Funding → New**.

*The **Funding Sources – New** window opens.*

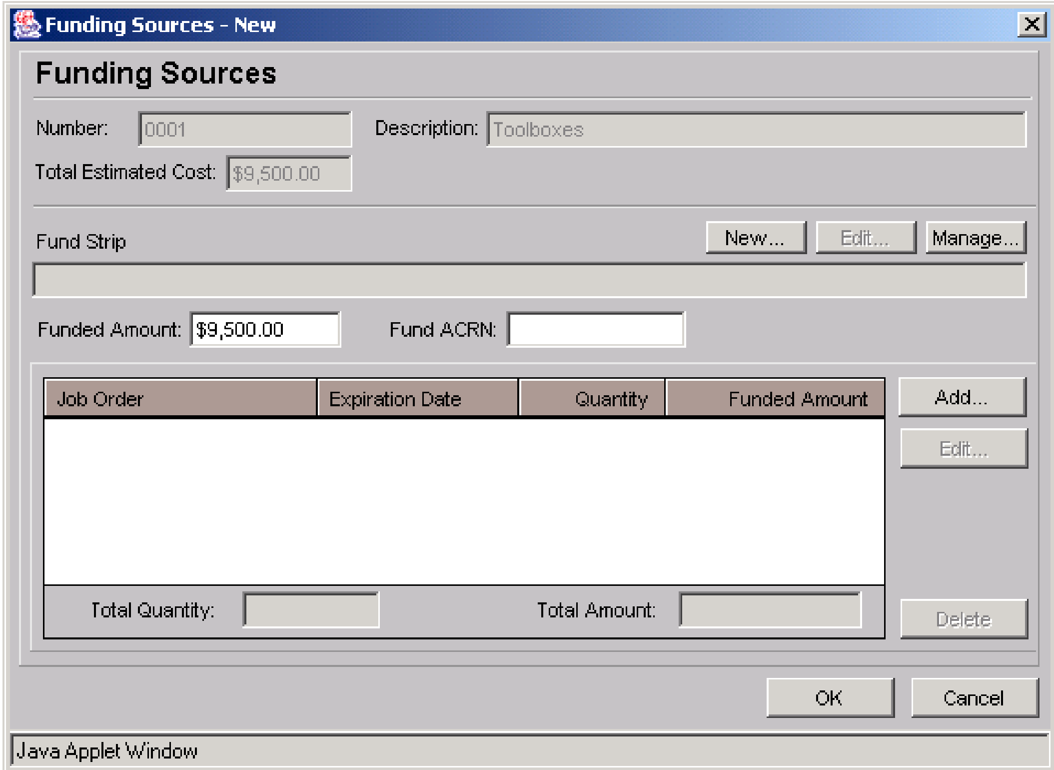

Figure 163: Funding Sources – New Window

2. Click the [**Add**] button next to the **Job Order** table.

   *The **Attach Job Order – New** window opens.*

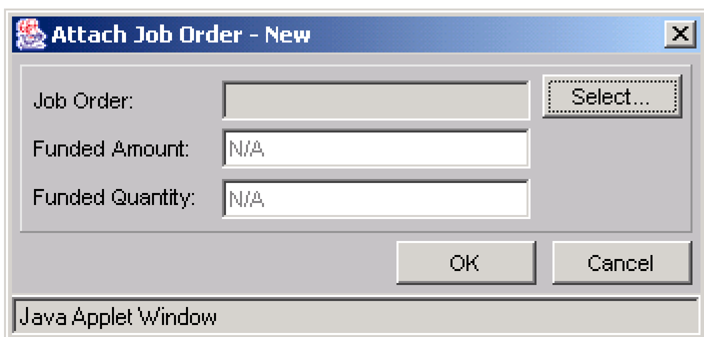

Figure 164: Attach Job Order – New Window

3. Click the [**Select**] button.

*The **Job Order Number Search** window opens.*

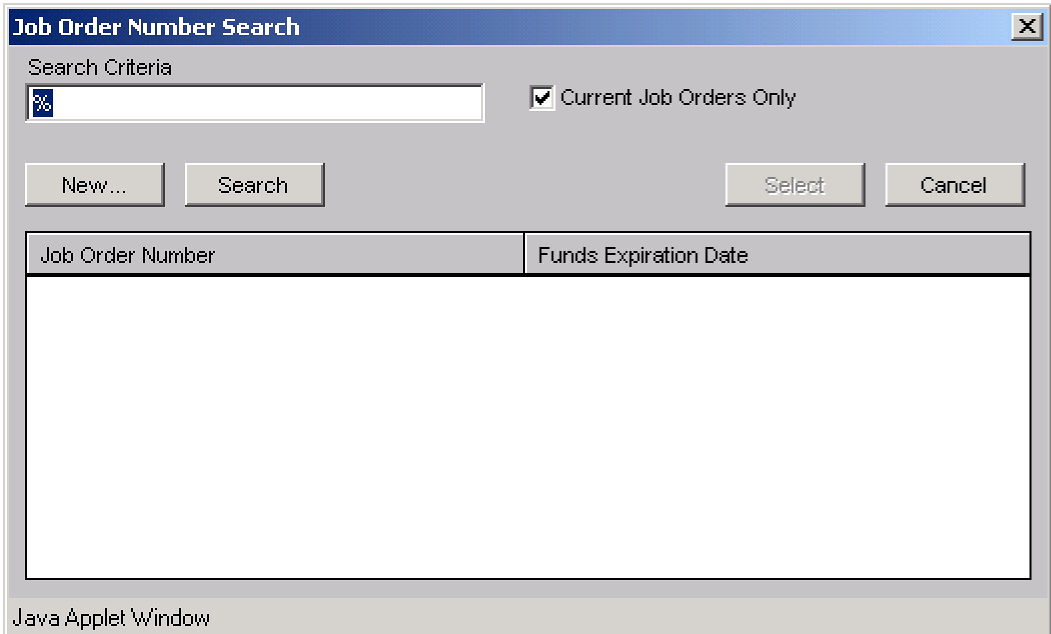

Figure 165: Job Order Number Search Window

4. Click the [**New**] button.

   *The **Create New Job Order** window opens.*

Figure 166: Create New Job Order Window

5. Enter a number in the **Job Order Number** field and an expiration date in the **Funds Expiration Date** field.

Note: The funds expiration date can be entered manually or by using the Auto-Calendar feature.

6. Click [**OK**] to return to the **Job Order Number Search** window.

7. Double-click the new job order to return to the **Attach Job Order – New** window.

8. Click [**OK**] to return to the **Funding Sources – New** window.

   *The job order displays in the **Funding Sources – New** window.*

9. Click [**OK**] to return to the *Funding* tab of the **Line Item Detail** window.

10. From the menu, select **File → Update** to update the funding information.

Note: The PR must be saved to save the funding information.

Attaching a Job Order

PRweb users can attach job orders at the line item level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding and job order information is read-only.

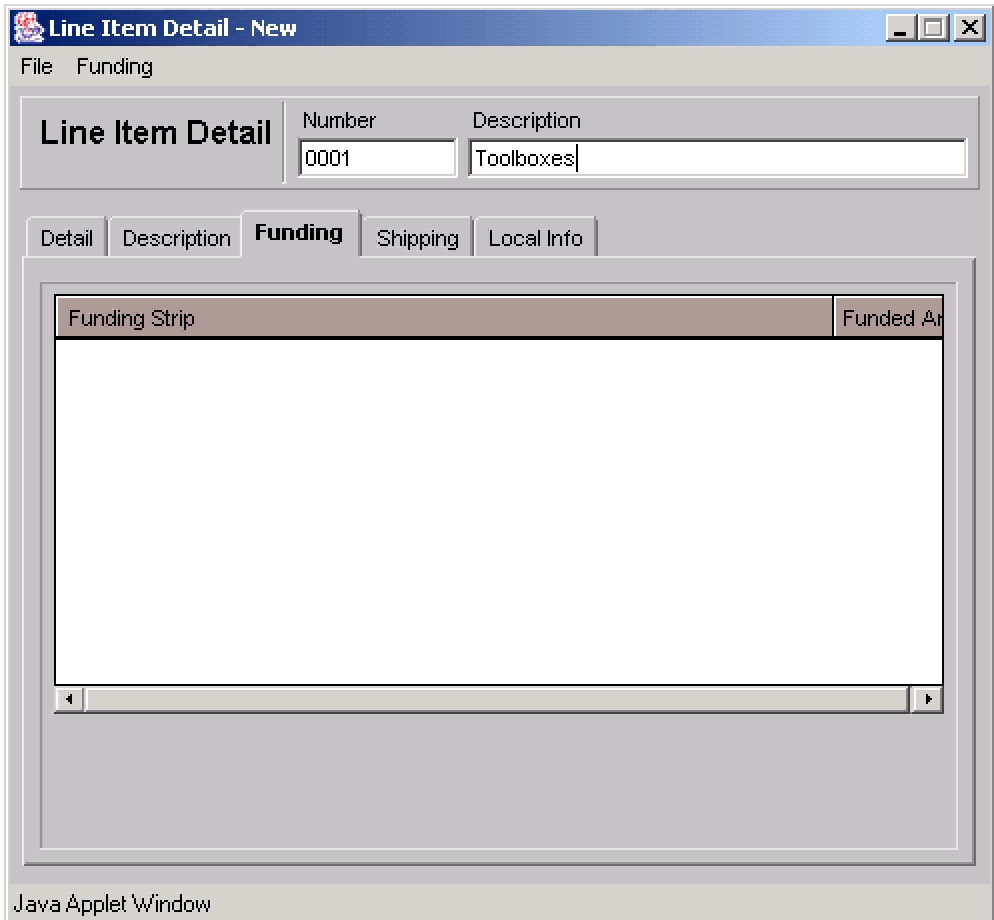

Figure 167: Line Item Detail – New – Funding Tab

1. From the menu, select **Funding → New**.

*The **Funding Sources – New** window opens.*

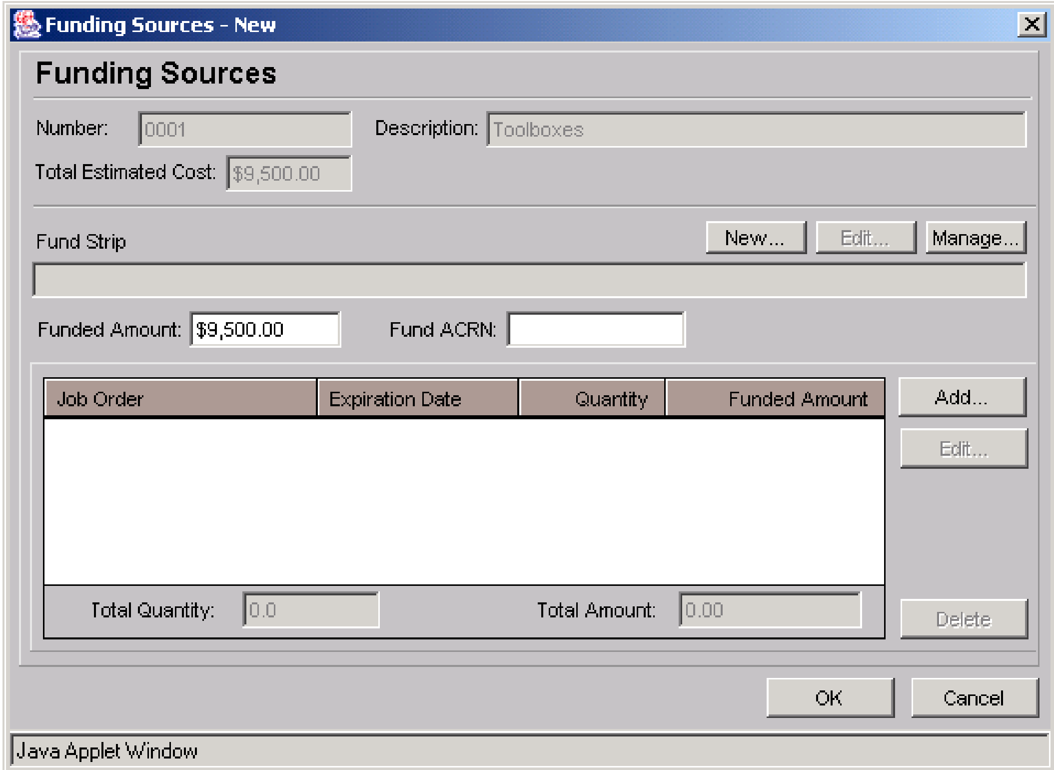

Figure 168: Funding Sources – New Window

2. Click the [**Add**] button next to the **Job Order** table.

   *The **Attach Job Order - New** window opens.*

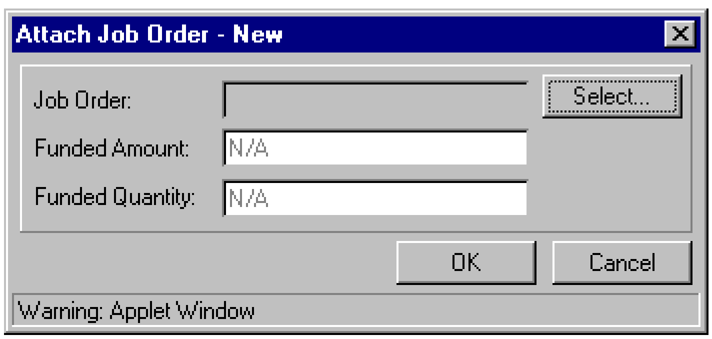

Figure 169: Attach Job Order – New Window

3. Click the [**Select**] button.

The ***Job Order Number Search*** *window opens.*

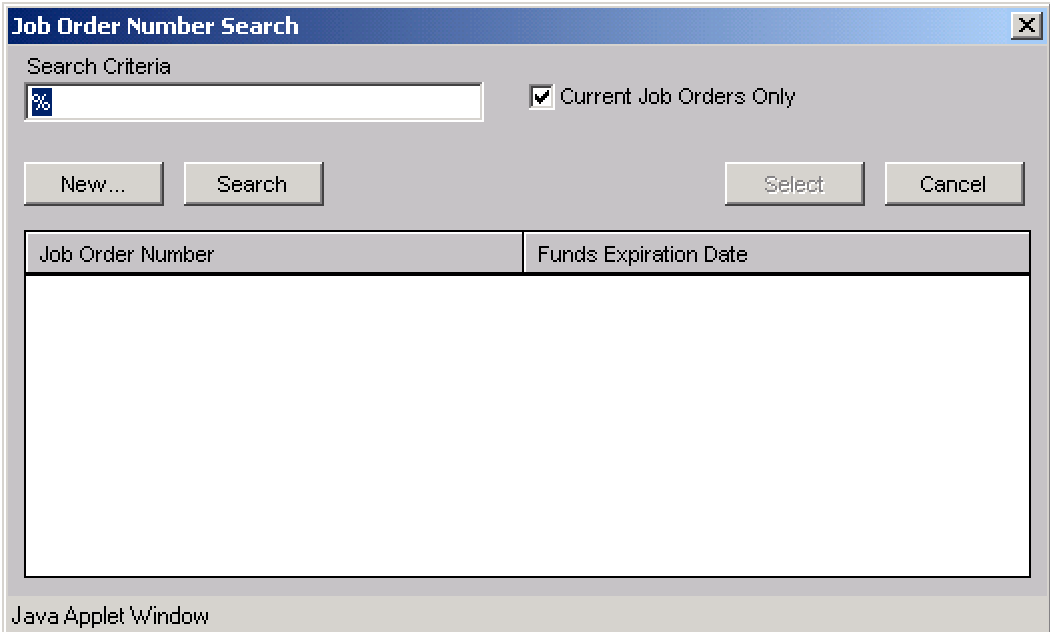

Figure 170: Job Order Number Search Window

4. Enter **Search Criteria.**
5. Check the **Current Job Orders Only** checkbox to display job orders that have not expired.
6. Click the [**Search**] button.

   The search results display.

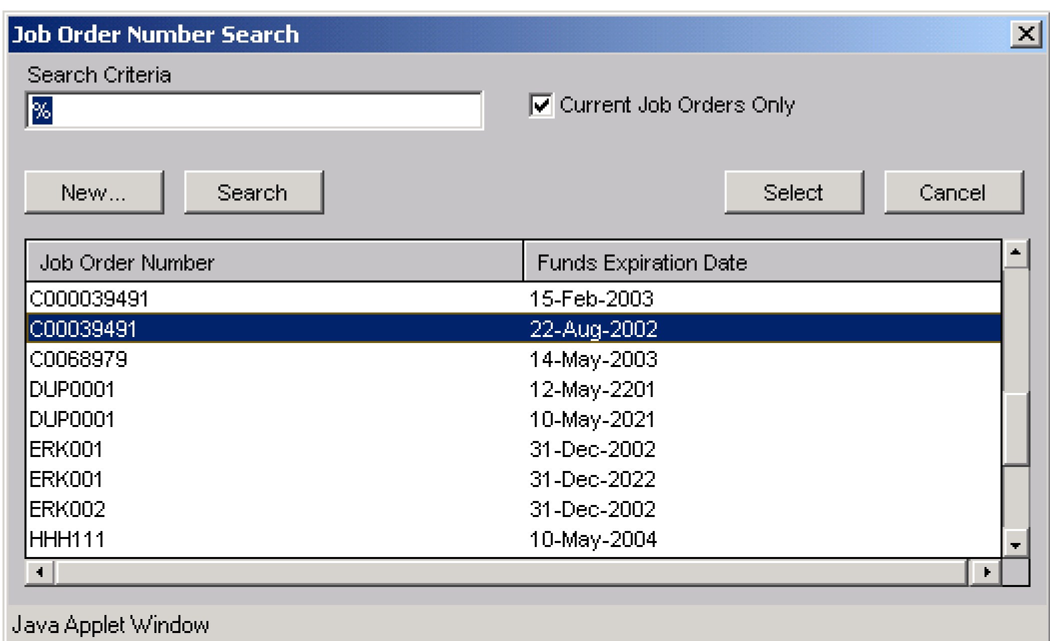

Figure 171: Job Order Number Search Window

7. Highlight the desired job order number and click the [**Select**] button.

   *The **Attach Job Order – New** window opens.*

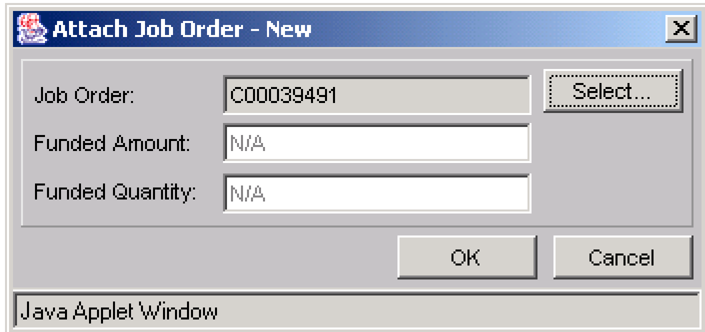

Figure 172: Attach Job Order – New Window

8. Click [**OK**] to return to the **Funding Sources – New** window.

9. Click [**OK**] to return to the *Funding* tab of the **Line Item Detail** window.

10. From the menu, select **File → Update** to update the funding information.

Note: The PR must be saved to save the funding information.

Editing a Job Order

PRweb users can edit job orders at the line item level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding and job order information is read-only.

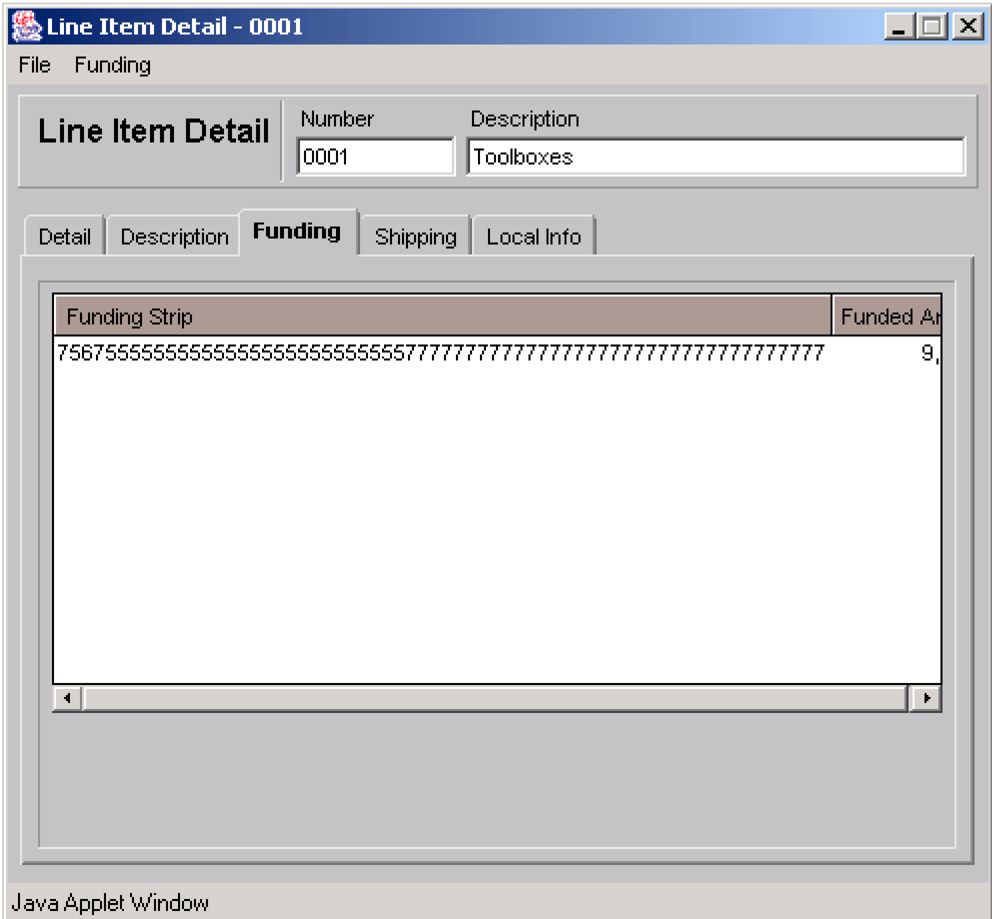

Figure 173: Line Item Detail – <Line Item Number> – Funding Tab

1. Double-click an existing funding source.

*The **Funding Sources** window opens.*

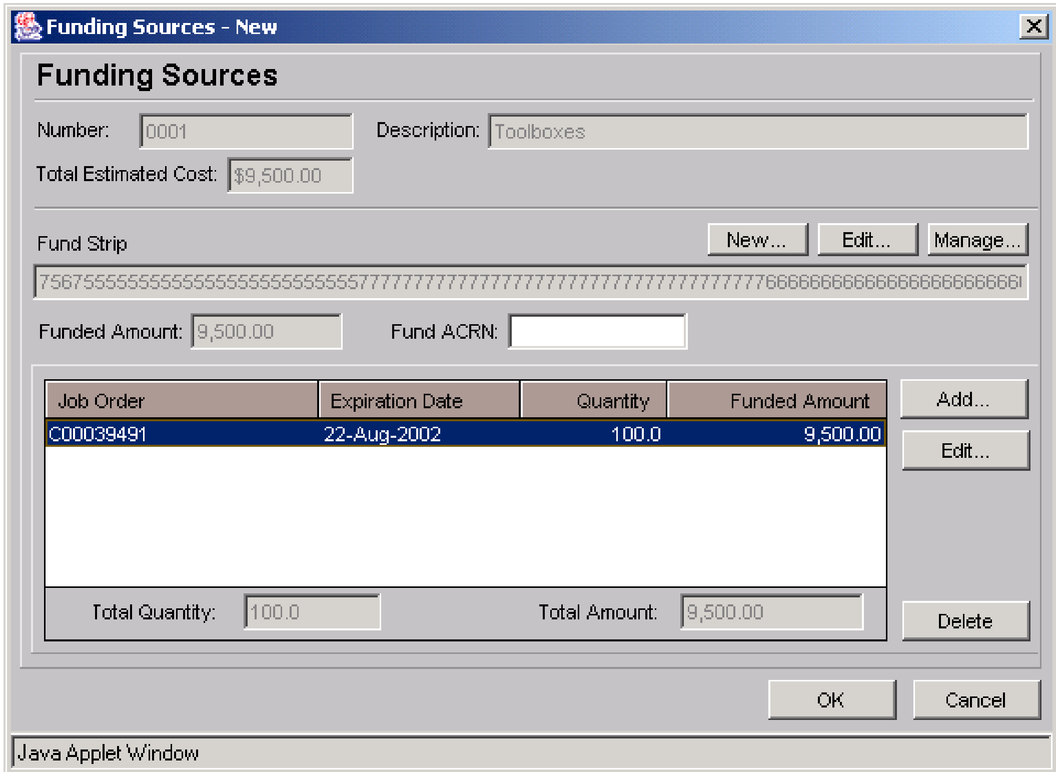

Figure 174: Funding Sources Window

2. Highlight the desired job order and click the [**Edit**] button next to the **Job Order** table.

   *The **Attach Job Order – <Job Order Name>** window opens.*

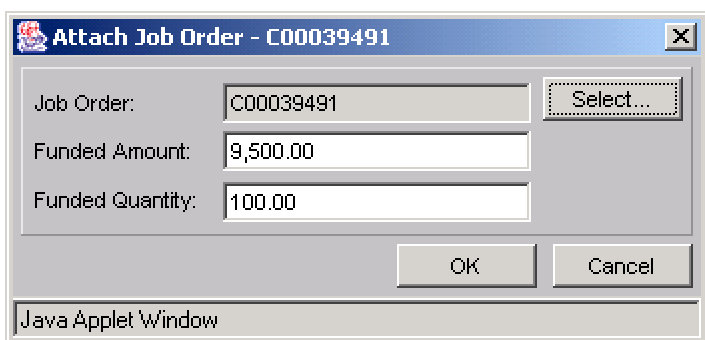

Figure 175: Attach Job Order - <Job Order Name> Window

3. Click the [**Select**] button.

*The **Job Order Number Search** window opens.*

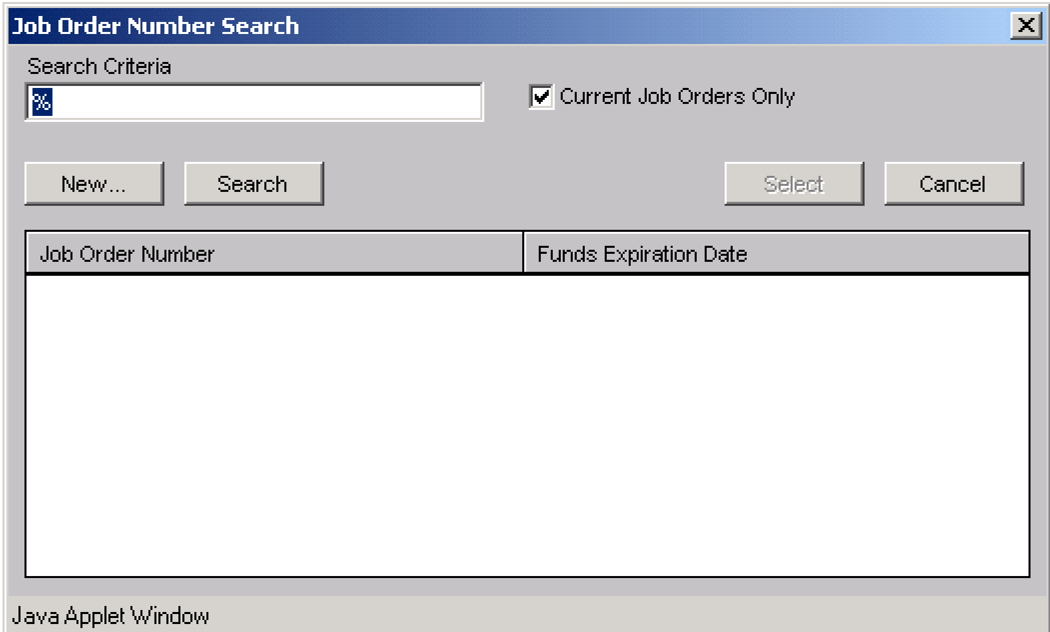

Figure 176: Job Order Number Search Window

4. Enter **Search Criteria**, and click the [**Search**] button.

5. Highlight a job order number and click the [**Select**] button.

   *The **Attach Job Order - <Job Order Name>** window opens with the new job order number displayed in the **Job Order** field.*

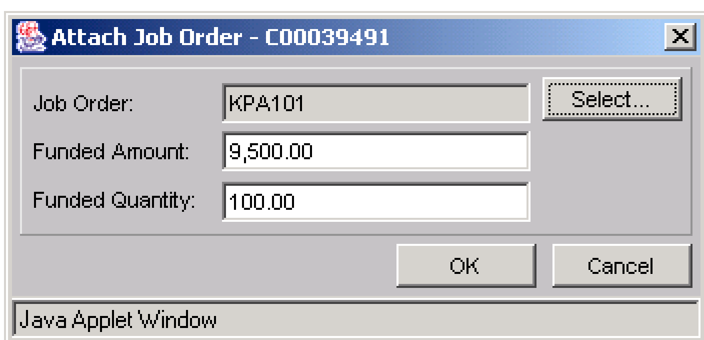

Figure 177: Attach Job Order - <Job Order Name> Window

6. Click [**OK**] to return to the **Funding Sources** window.

7. Click [**OK**] to return to the *Funding* tab of the **Line Item Detail** window.

8. From the menu, select **File → Update** to update the funding information.

Note: The PR must be saved to save the funding information.

Deleting a Job Order

PRweb users can delete job orders at the line item level. The System Administrator grants user rights to manage funding information. If the user does not have these rights, funding and job order information is read-only.

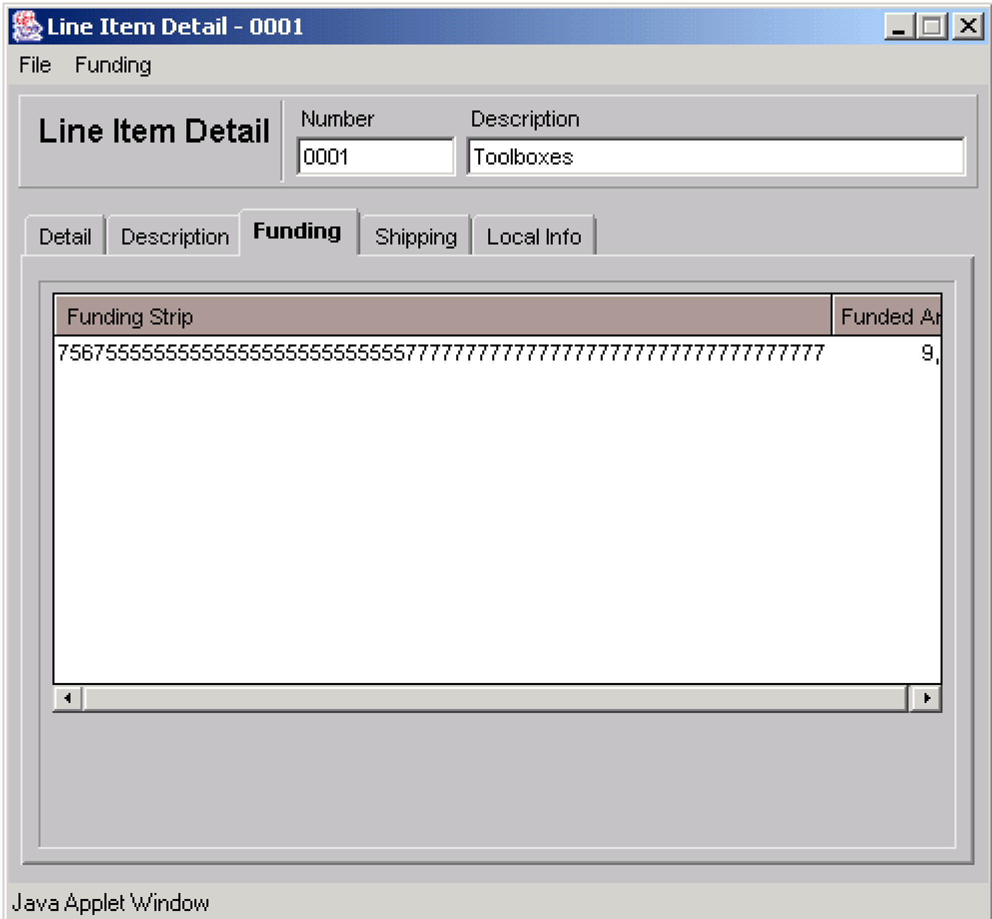

Figure 178: Line Item Detail - <Line Item Number > Funding Tab

1. Double-click an existing funding source.

*The **Funding Sources** window opens.*

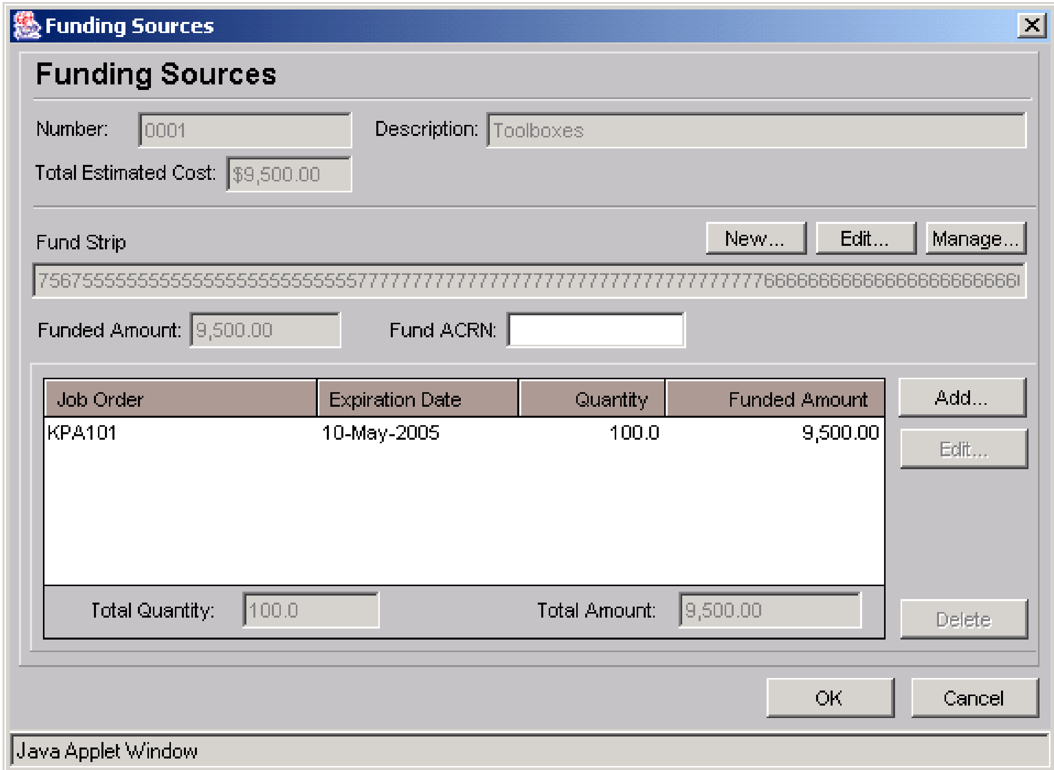

Figure 179: Funding Sources Window

2. Highlight a job order and click the [**Delete**] button next to the **Job Order** table.

3. Click the [**Yes**] button in the **Confirmation** window.

   *The **Funding Sources** window displays with the job order deleted from the table.*

4. Click [**OK**] to return to the *Funding* tab of the **Line Item Detail** window.

Note: The PR must be saved to save the funding information.

Updating the Purchase Request with a Line Item

PRweb users can update the PR with a line item once it has been created or modified. An updated PR reflects any changes made to the line item since the last update. To update the PR with a line item, select the **File → Update** from the **Line Item Detail** menu. Updating the PR with a line item returns the user to the **PR** window.

Note: Updating and saving are two separate functions. A PR that has been updated with a line item needs to be saved in order to save the PR in its updated status.

Creating a New Subcontract Line Item

The process for creating a Subcontract Line Item (SubCLIN) is similar to the creation of a Contract Line Item (CLIN), however, there are a few differences. For example, if you have a **Priced CLIN**, the CLIN Type defaults to **Info Only** in accordance with the Defense Federal Acquisition Regulations (DFARs).

1. Open an existing PR.
2. Highlight a CLIN from the *Line Item* tab of the **Purchase Request** window.
3. From the menu, select **Line Item → New → SubCLIN**.

   *The **Line Item Detail – New** window opens with the* Detail *tab displayed.*

   The line item detail header displays at the top of the **Line Item** form and is visible from every tab of the **Line Item Detail – New** window.

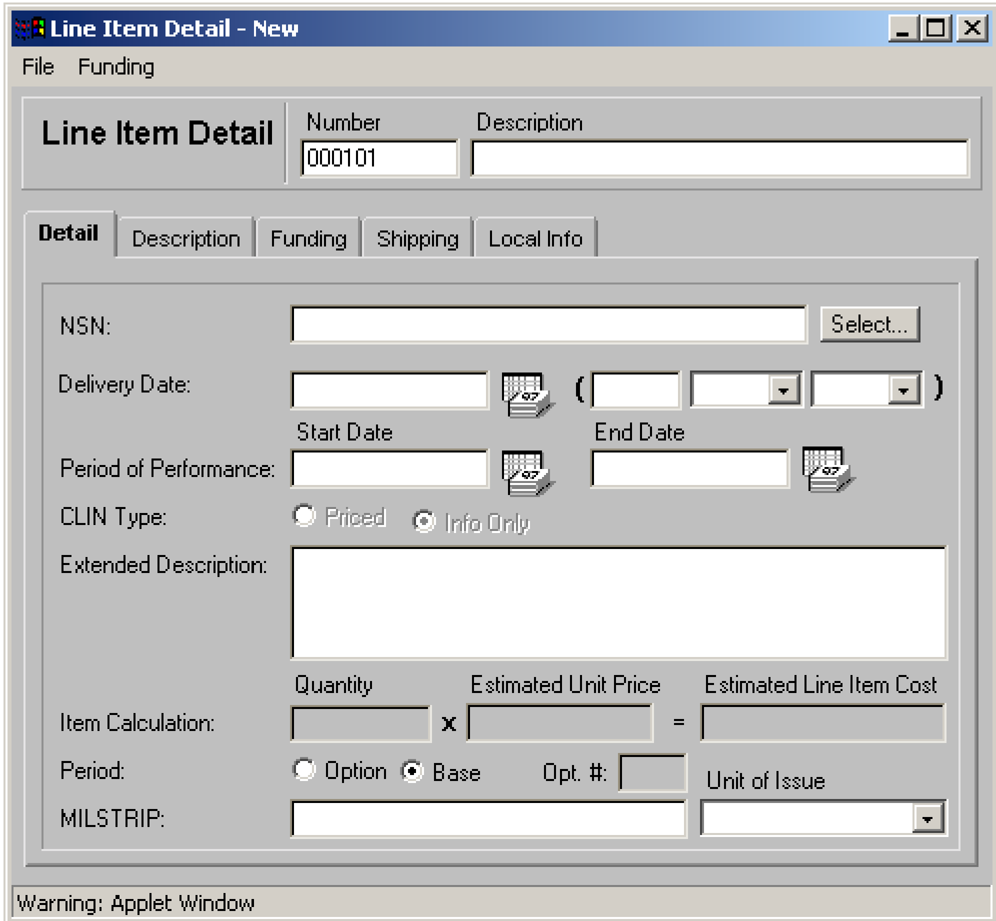

Figure 180: Line Item Detail – New – Detail Tab

Note: Since creating a SubCLIN is similar to creating a CLIN, refer to "*Creating a New Line Item*" in this chapter, to learn how to create a CLIN.

4. From the menu, select **File → Update**.

The SubCLIN displays as part of CLIN "0001".

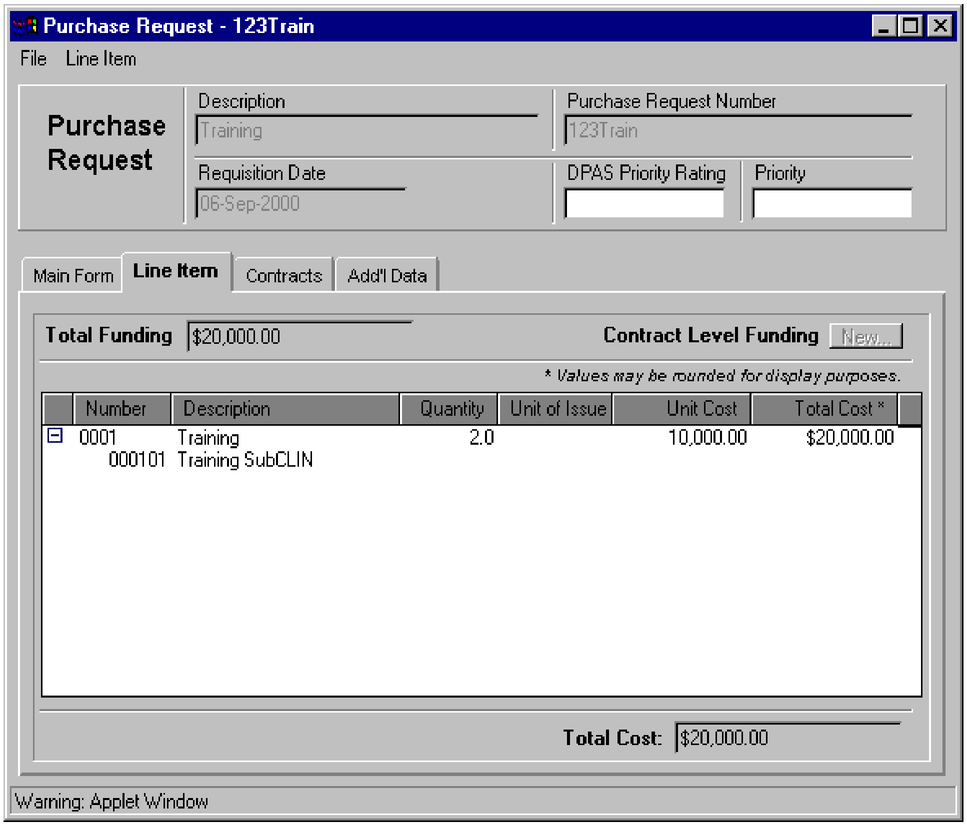

Figure 181: Purchase Request – <Purchase Request Number> – Line Item Tab

Shipping Tab

The *Shipping* tab allows the *PRweb* user to identify the **Shipping Address**, Free On Board (**F.O.B.**), **Additional Markings**, **Charge Shipping To**, Hazardous Material (**HAZMAT**) Requirements and **Shipping Mode**.

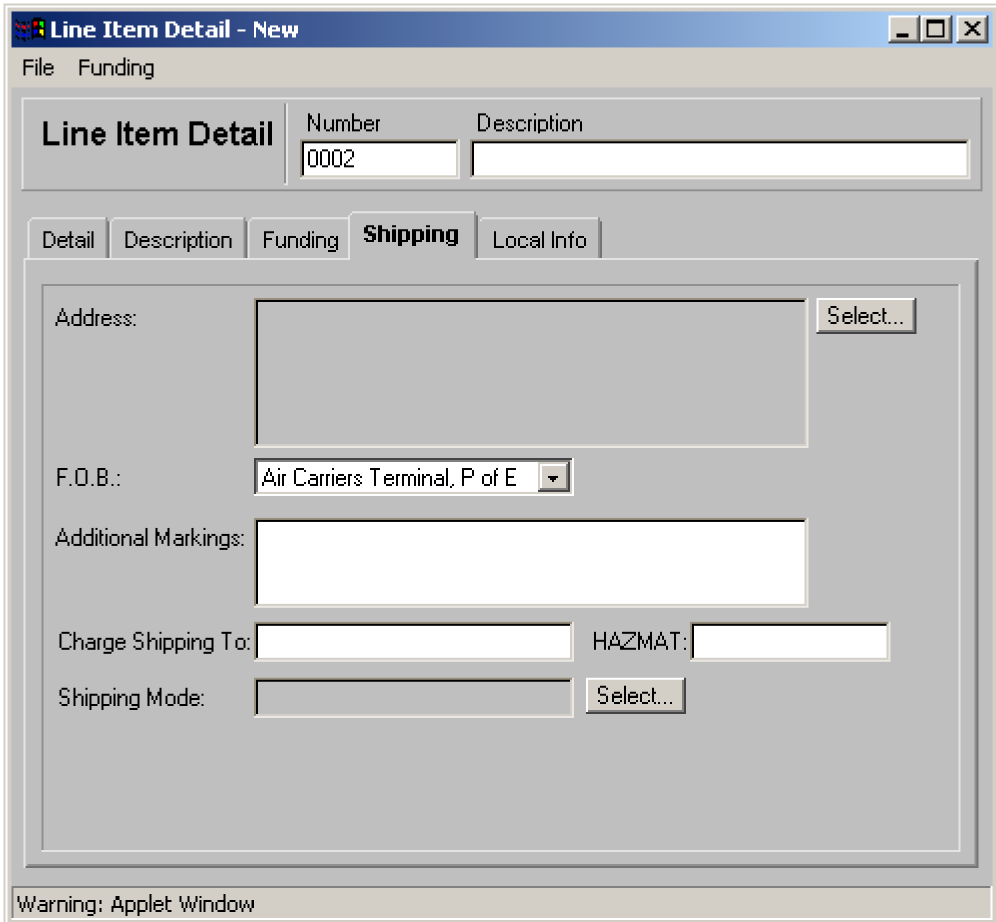

Figure 182: Line Item Detail – New – Shipping Tab

1. To enter a shipping address, click the [**Select**] button next to the **Address** field.

   The **Address** field allows the *PRweb* user to search for a specific address from the PD^2 database.

*The **Ship to Contact Search** window opens.*

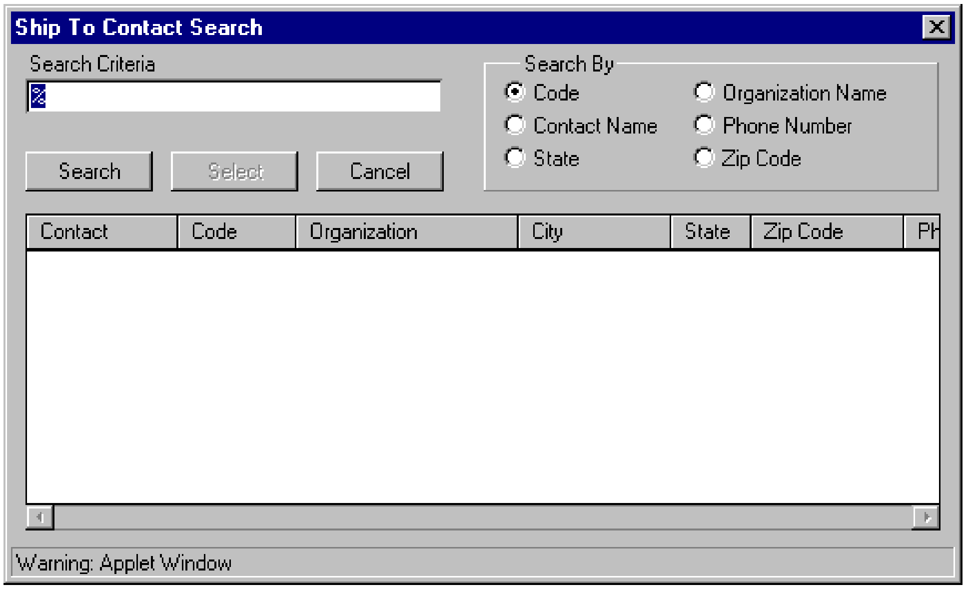

Figure 183: Ship To Contact Search Window

2. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information on searches, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

3. Highlight the desired shipping address.

4. Click the [**Select**] button.

   The Shipping *tab displays the selected shipping address in the **Address** field.*

5. If a PD² user adds multiple delivery information to a PR and return routes that PR to *PRweb*, *PRweb* will not display the **Shipping Address** field. To see a summary of the multiple delivery information, click on the [**Multiple Deliveries**] button located on the **Detail** tab of the PR. *PRweb* displays the multiple delivery information including the ship to address information in a summary format that is read-only.

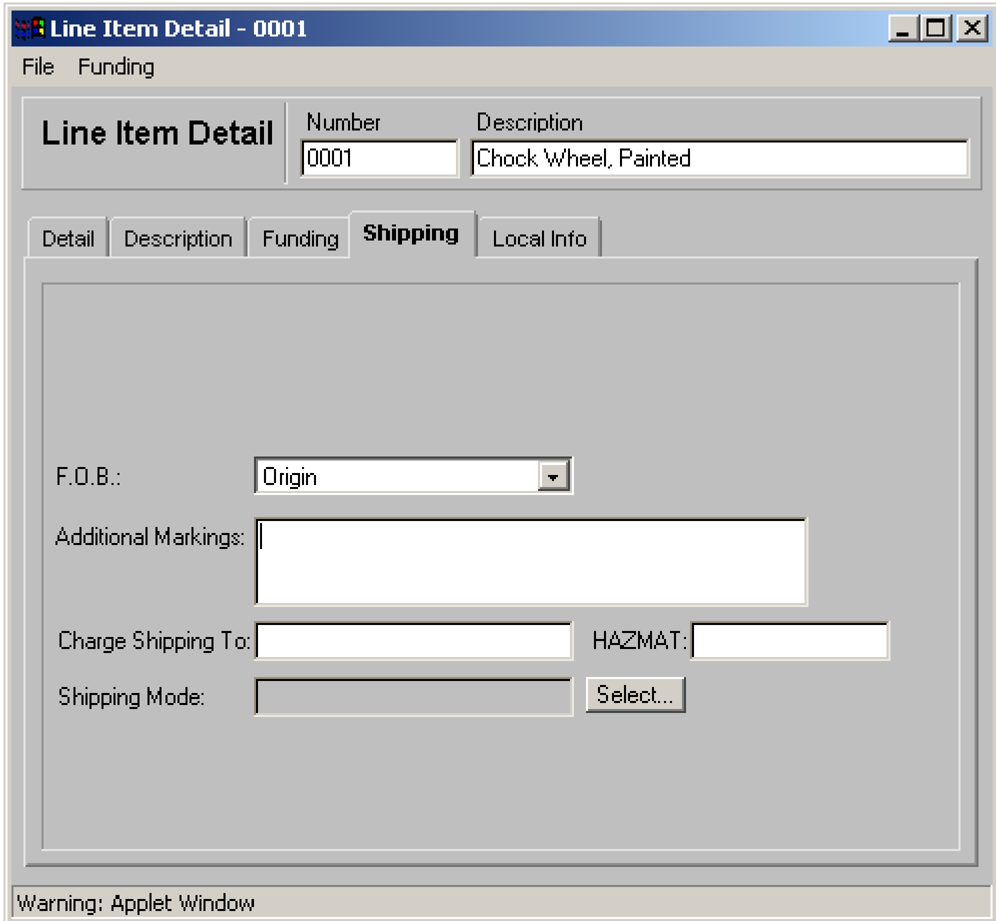

Figure 184: Line Item Detail – 0001 – Shipping Tab

6. To enter Free On Board instructions, select the desired item from the **F.O.B.** drop-down list box.

7. Enter any additional markings and specifications for shipping in the **Additional Markings** field.

   This field holds up to 60 characters.

8. Enter shipping charge information in the **Charge Shipping To** field.

   This field holds up to 40 characters.

9. Enter Hazardous Materials (HAZMAT) information in the **HAZMAT** field.

   This field holds up to four characters.

10. To enter the mode of shipping, click the [**Select**] button next to the **Shipping Mode** field.

    The **Shipping Mode** field allows the *PRweb* user to search for the shipping mode that is required for the material being shipped.

*The **Shipping Mode Search** window opens.*

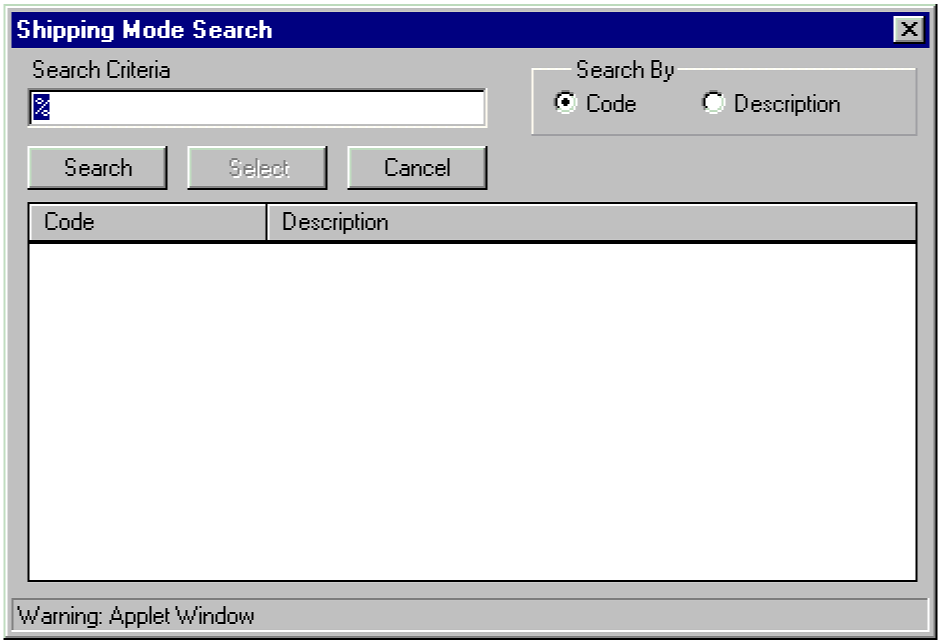

Figure 185: Shipping Mode Search Window

11. Enter **Search Criteria**, and click the [**Search**] button.

Note: For more information on searches, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

12. Highlight the desired shipping mode.

13. Click the [**Select**] button.

    The Shipping *tab displays with the selected shipping mode in the **Shipping Mode** field.*

Local Info Tab

The *Local Info* tab allows the *PRweb* user to view, refresh, and edit line item local fields of a PR. The PD^2 System Administrator determines the line item local info fields that are displayed on the *Local Info* tab. Refreshing the *Local Info* tab allows the user to update the line item local fields with the latest changes made by the PD^2 System Administrator. Clicking the [**Refresh**] button for a line item updates all local info configurations for all line items on the PR. When the Local Info is refreshed, any existing data in the fields remain, only the labels of the fields change. If the new configuration has deleted fields from the old configuration, they are not displayed. If there have been no updates made in PD^2, the fields remain the same.

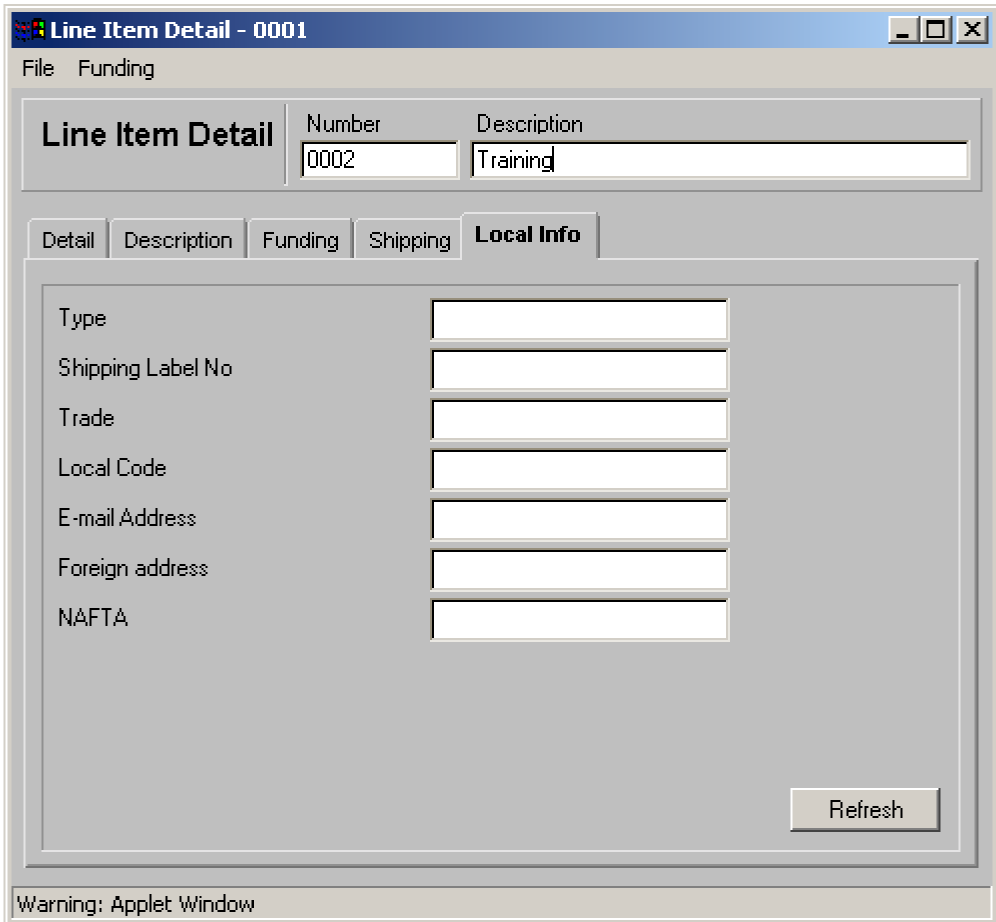

Figure 186: Line Item Detail – New – Local Info Tab

1. Click on the [**Refresh**] button to refresh the line item local fields to the most current configuration set by the PD^2 System Administrator.
2. Enter line item local information in the appropiate fields.

Copying a Line Item

1. From the Purchase Request window, click on the Line Item to be copied.

2. From the menu, select **Line Item → Copy**.

   *The **Line Item tab is updated with the copied Line Item**.*

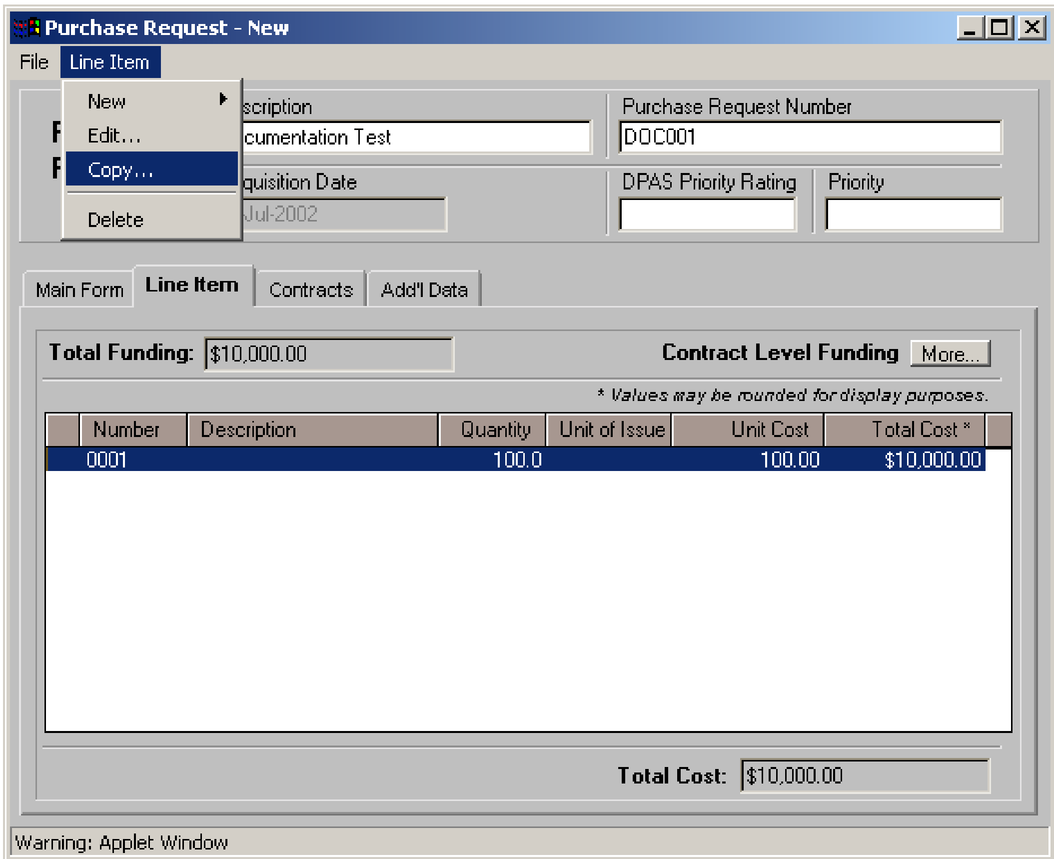

Figure 187: Purchase Request - <Purchase Request Number> – Line Item Tab

Note: Line Items cannot be copied on PR Modifications. For more information on PR Modifications, refer to *Chapter 5: PR Modifications*.

Chapter 7: Attachments

PRweb users may attach external files to the PR. The creation of an attachment facilitates the completion of a Requirements Package. For example, a *PRweb* user can attach a Statement of Work document to a PR or PR Modification and send both objects to the Contracting Office. The *PRweb* user may add, view and remove any Object Linking and Embedding (OLE) compatible objects.

In This Chapter...

Using the Attachments function described in this chapter, you can:

- Add an attachment
- View an attachment
- Remove an attachment

Adding an Attachment

PRweb users may attach any OLE compatible object to the PR.

To attach an OLE compatible object:

1. From the *PRweb* user's desktop, open a PR.
2. From the menu, select **File → Attachments**.

   *The **File Attachments** window opens.*

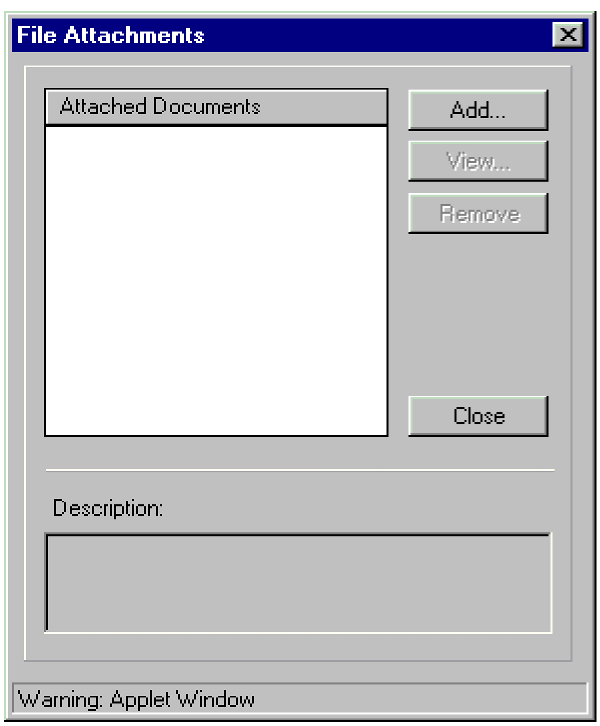

Figure 188: File Attachments Window

3. Click the [**Add**] button**.**

   *The **New Attachment** window opens.*

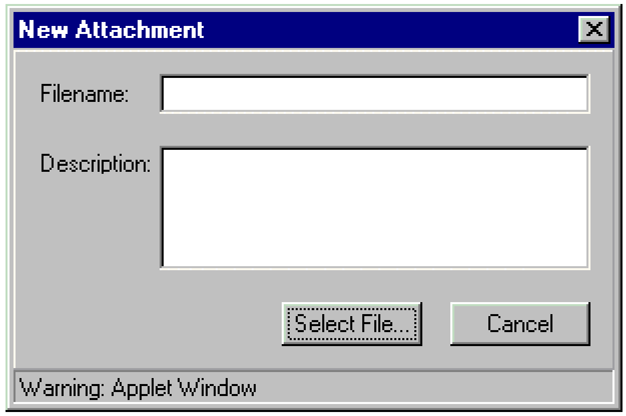

Figure 189: New Attachment Window

4. Enter the name of the file to be attached in the **Filename** field.

Note: The filename does not need to be the actual name of the object being attached. The filename displays for reference purposes. Users should include the extension of the object they are attaching at the end of the filename. For example, if a Statement of Work created in Microsoft Word is attached, the filename should be in the form “SOW.doc”. In this case, the file’s extension is “.doc.”

---

5. Enter a description in the **Description** field.

6. Click the [**Select File**] button to continue.

*The **Upload File** window opens as a new Web browser window.*

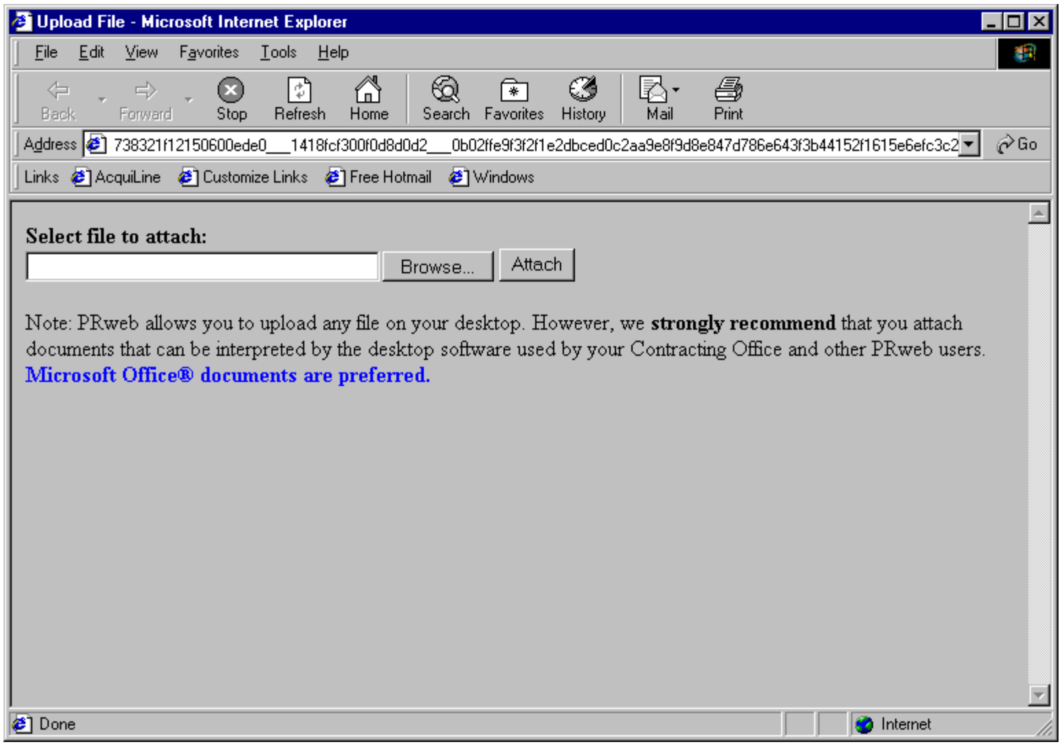

Figure 190: Upload File Window

7. From the **PRweb Attach File** window, click the [**Browse**] button.

   *The **Choose file** window opens.*

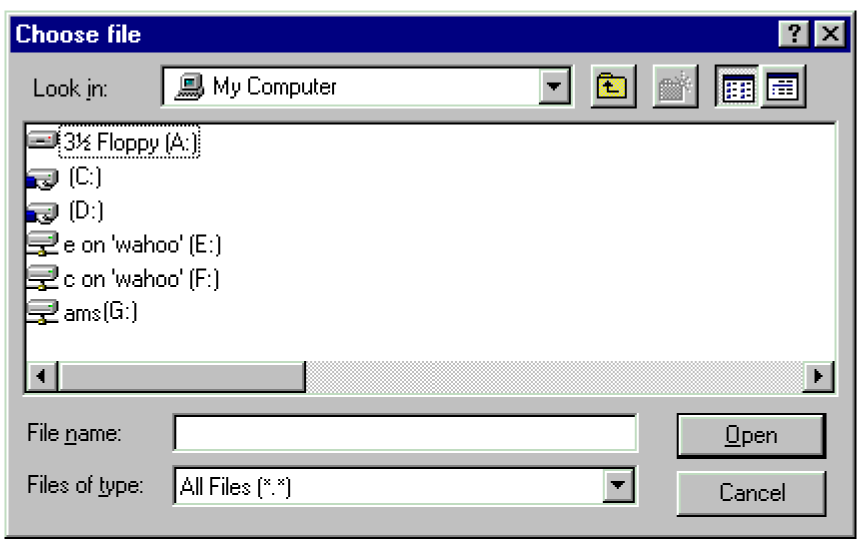

Figure 191: Choose File Window

8. From the **Choose File** window, locate the desired object to attach to the PR.

9. Highlight the object.

10. Click the [**Open**] button in the **Choose File** window.

    *The **Upload File** window opens.*

11. Click the [**Attach**] button to attach the object to the PR.

12. Click [**OK**].

    *The **Upload Complete** window opens with the "Successful Attachment" message.*

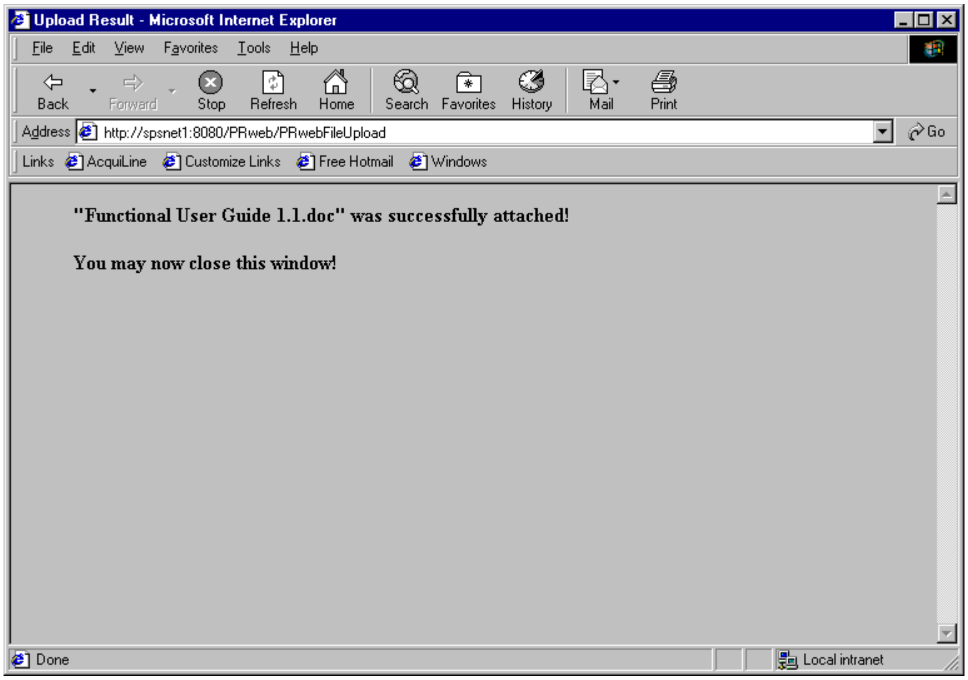

Figure 192: Upload Complete Window

13. Close the window to return to the **File Attachments** window.

The new attachment is displayed in the ***Attached Documents*** *table with its description displayed in the* ***Description*** *field.*

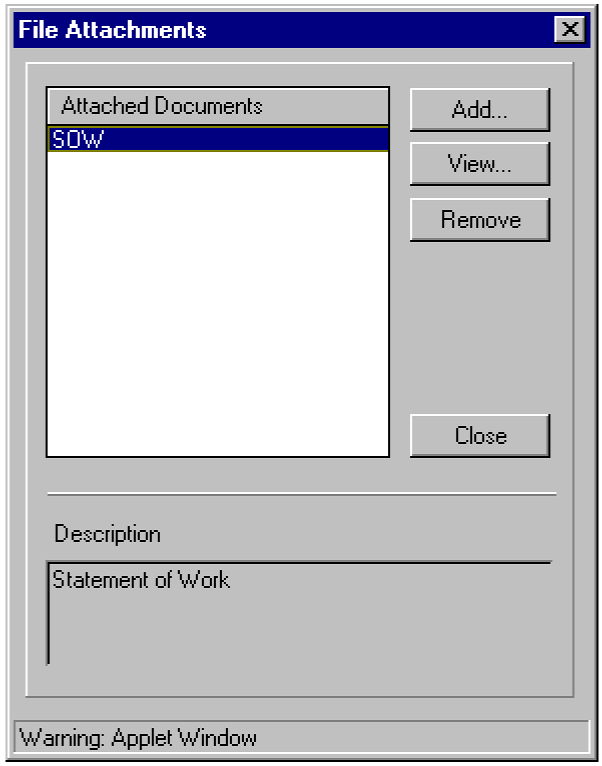

Figure 193: File Attachments Window

14. Click the [**Close**] button to return to the PR.

15. From the menu, select **File → Save** to save the attachment.

Viewing an Attachment

PRweb users may view objects that have been attached to the PR.

To view an attachment:

1. From the *PRweb* user's desktop, open a PR.

2. From the menu, select **File → Attachments**.

*The **File Attachments** window opens.*

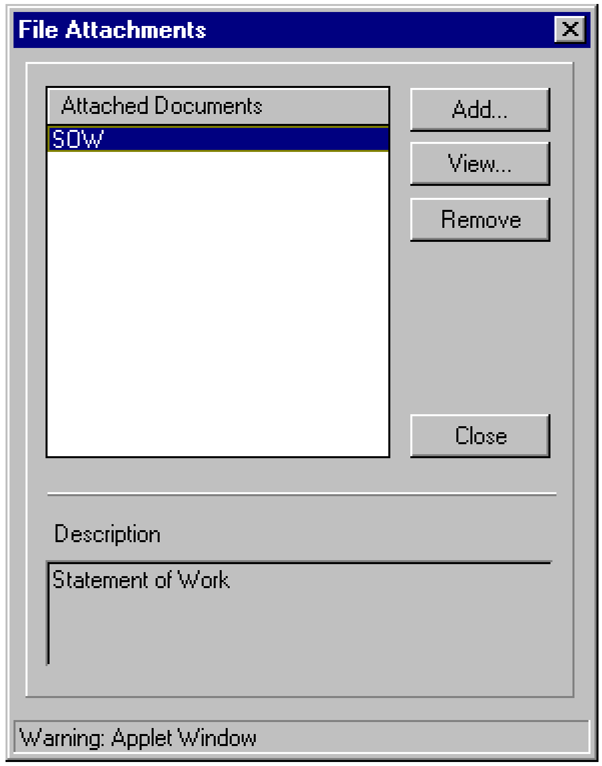

Figure 194: File Attachments Window

3. Highlight an attachment and click the [**View**] button.

   *The **Viewing Instructions** window opens.*

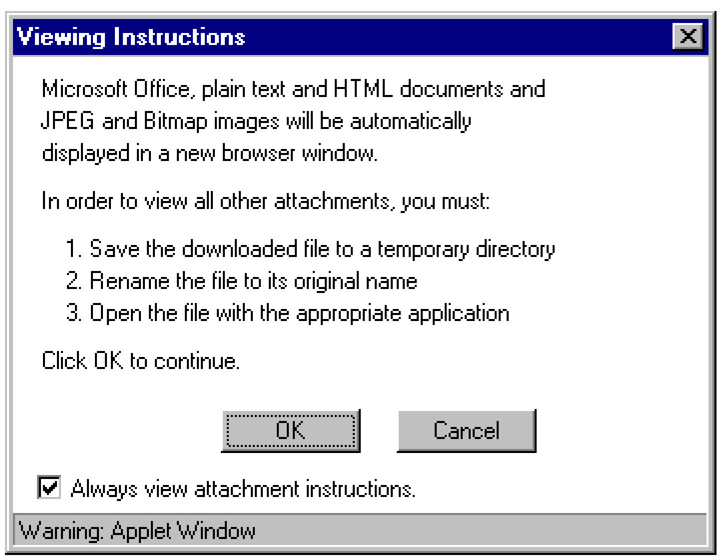

Figure 195: Viewing Instructions Window

4. Read the Viewing Instructions and click [**OK**].

Note: If changes were made to the attachment, the user must remove the original object and re-attach the updated object.

Removing an Attachment

PRweb users may remove attachments from a PR.

To remove an attachment:

1. From the *PRweb* user's desktop, open an existing PR with an attachment.
2. From the menu, select **File → Attachments**.

   *The **File Attachments** window opens.*

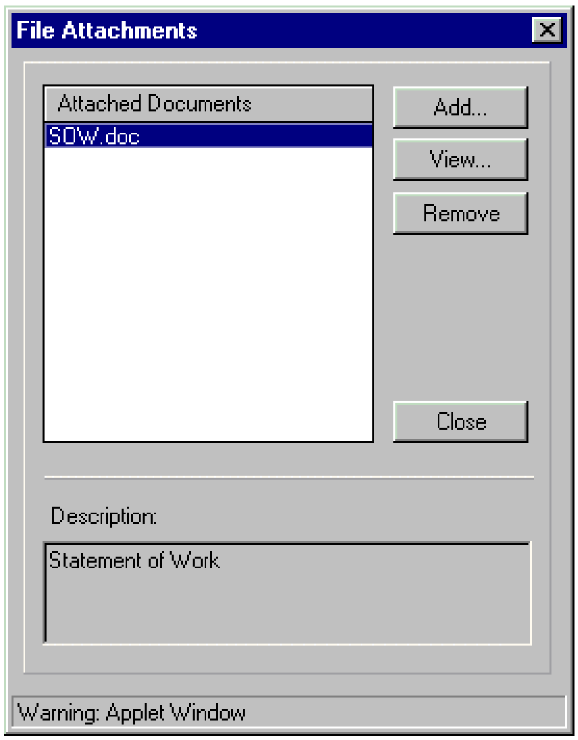

Figure 196: File Attachments Window

3. From the **File Attachments** window, highlight the desired attachment and click the [**Remove**] button.
4. Click the [**Close**] button to return to the PR.
5. From the menu, select **File → Save** to save the attachment.

Note: An attachment on a PR Modification that was pulled forward from the conform copy can not be removed in *PRweb*. Only attachments that were added to the PR Modification can be removed. The attachments pulled forward from the conform copy can be removed in PD².

Chapter 8: DD254

In This Chapter...

Using the function described in this chapter, you can:

- Add a security classification specification (DD254) to the PR

The **DD254** menu option allows the *PRweb* user to add a contract Security Classification Specification (DD254) to the PR.

To add a DD254 to a PR:

1. From the *PRweb* user's desktop, open an existing PR.

2. From the menu, select **File → DD254**.

   *The **DD254** window opens.* This window contains six tabs:

   - Items 1-5
   - Items 6-9
   - Items 10-11
   - Items 12-13
   - Items 14-15
   - Items 16-17

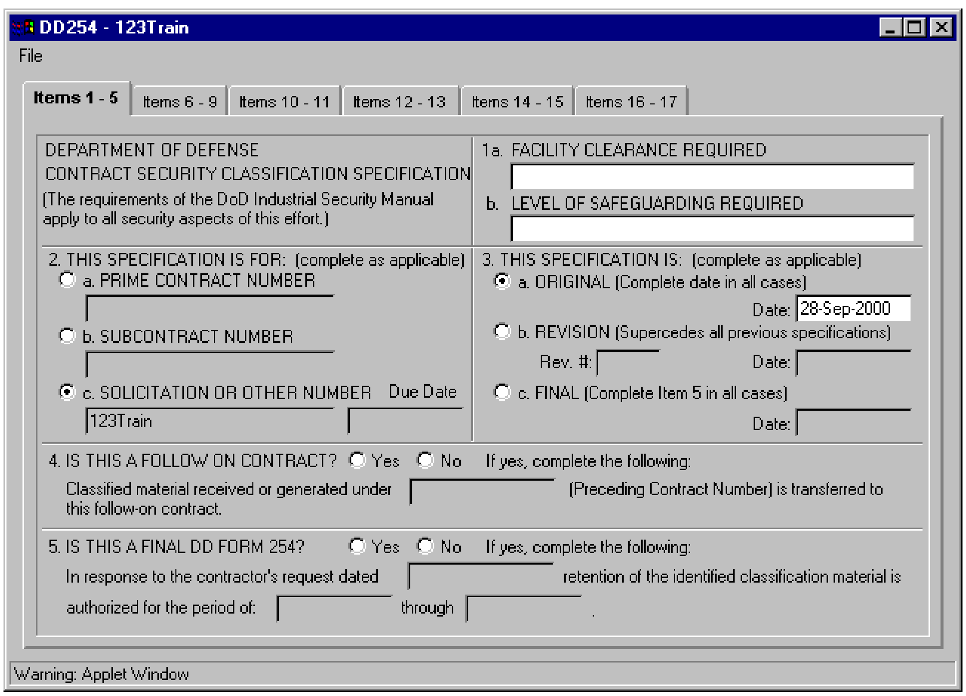

Figure 197: DD254 - <Purchase Request Number> Window

3. Enter the appropriate information on each tab to complete the DD254.

4. From the menu, select **File → Update** to update the PR with the DD254.

   Updating the PR with a DD254 form closes the **DD254** window.

Note: Updating and saving are two separate functions. A PR that has been updated with a DD254 needs to be saved in order to save the PR in its updated status.

Chapter 9: Workflow

Routing

The *PRweb* module supports the electronic routing and approval of PRs and PR Mods within *PRweb* and between *PRweb* users and PD^2 users. Members of security groups that only have routing access to specific routing templates may only choose from those templates to which they have access when routing. *PRweb* users without restricted security access can create new routing sheets, edit existing routing sheets and create route templates to facilitate the electronic review and approval process.

In This Chapter…

Using the Workflow functions described in this chapter, you can:

- Route a PR or PR Mod by creating a custom routing sheet
- Approve a PR or PR Mod
- View approval history

The user must select a PD^2 user in order to route a PR. However, a PR Mod is automatically routed to the PD^2 user that owns the conform copy of the base PR

Creating a Custom Routing Sheet

Only users with custom routing privileges may create custom routing sheets. Users have custom routing privileges if they are not a security group member or are a member of a security group that has custom routing privileges. Users with custom routing privileges may create routing sheets by using any combination of usernames, group names or template users.

Creating a Custom Routing Sheet – All Users

To create a custom routing sheet using the *All Users* option:

1. From the *PRweb* user's desktop, highlight a PR or PR Mod.

2. From the menu, select **Purchase Request → Route**.

   *The **Routing Sheet - <Purchase Request Number>** window opens.*

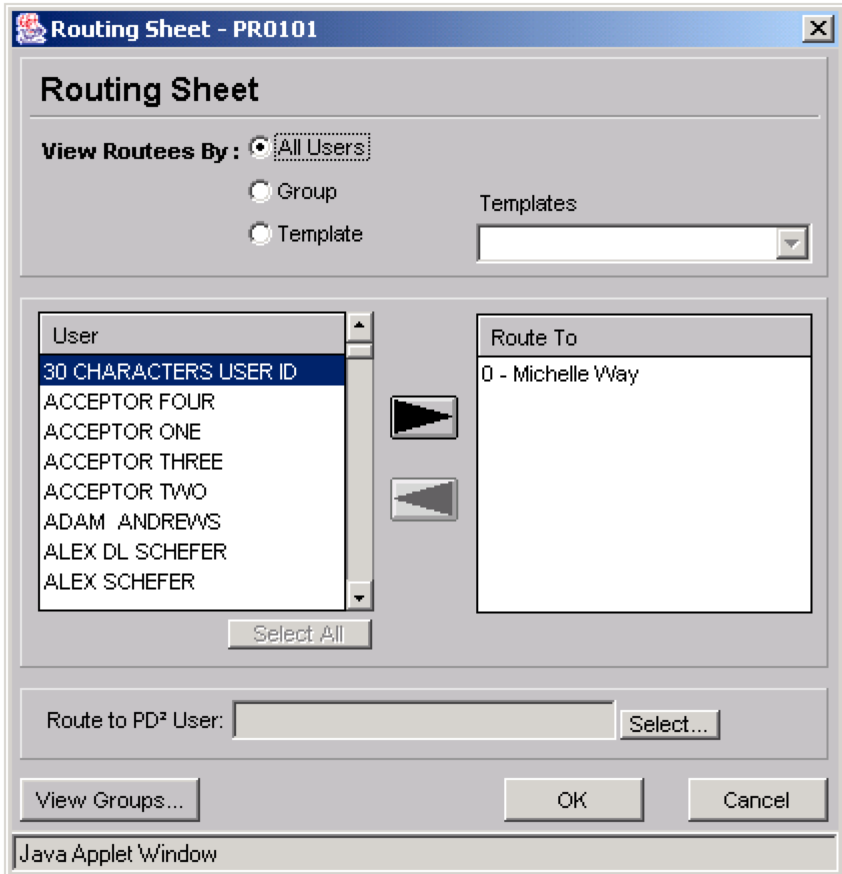

Figure 198: Routing Sheet - <Purchase Request Number> Window

Note: The **All Users** radio button is automatically selected by default.

3. From the **Routing Sheet** window, select the **View Routees By** radio button.

Note: The **User** list box displays all available users to add to the routing sheet. As users are added to the routing sheet their username displays in the order they were selected in the **Route To** list box. Users must be placed in routing order on the routing sheet. The user in the zero position is the creator of the PR and cannot be deleted from the routing sheet.

4. Select routees for the new routing sheet by highlighting desired users from the **User** list box and clicking the [▶] button.

Note: Routees may be removed from the routing sheet by highlighting the desired user from the **Route To** list box and clicking the [◀] button.

5. Click the [**Select**] button next to the **Route to PD^2 User** field.

   *The **Select PD^2 User** window opens.*

Figure 199: Select PD^2 User Window

Note: When the user clicks the [**Select**] button next to the **Route to PD^2 User** field on a route sheet for a PR Mod, a message displays that indicates that the PR Mod will be routed to the PD^2 user that owns the conform copy of the PR.

6. Highlight the appropriate PD^2 user.

7. Click the [**Select**] button.

   *The PD^2 user selected displays in the **Route to PD^2 User** field on the routing sheet.*

8. Click [**OK**] to initiate the routing sheet.

Note: Once a new routing sheet has been created and saved, routing initiates automatically. The creator of a PR does not need to approve the PR to begin the routing process.

Create a Route Sheet – Groups

Selecting the **Groups** radio button displays all organizational groups created by the *PRweb* System Administrator.

To create a route sheet using the **Groups** criteria:

1. From the *PRweb* user's desktop, highlight a PR.

2. From the menu, select **Purchase Request → Route**.

*The **Routing Sheet - <Purchase Request Number>** window opens.*

3. Select the **Group** radio button.

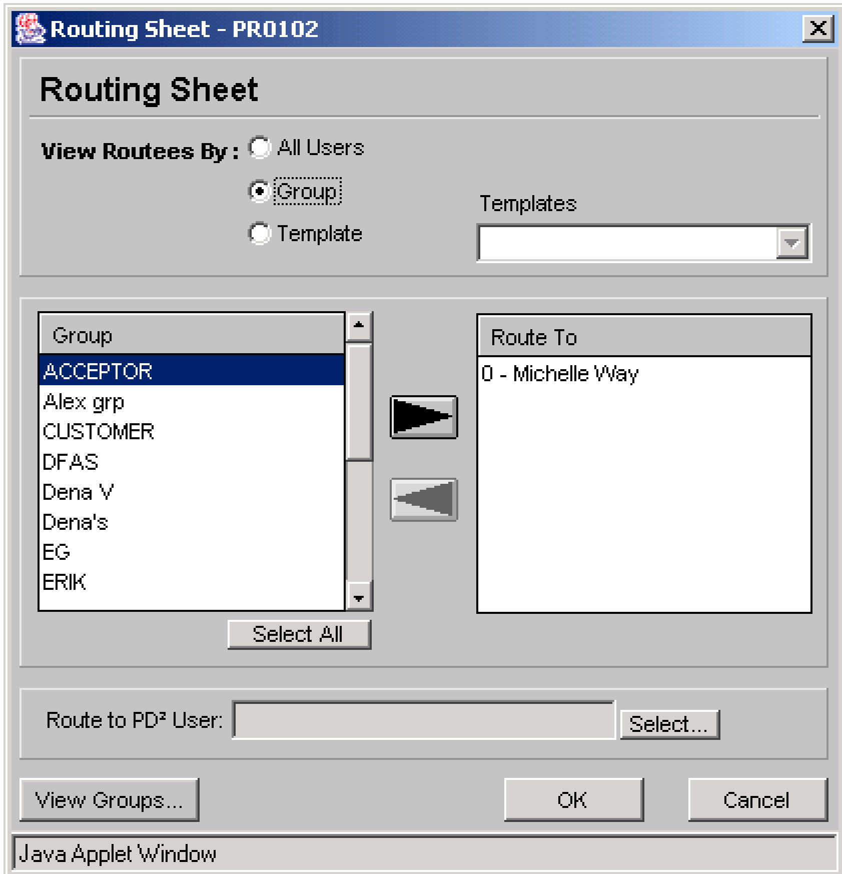

Figure 200: Routing Sheet - <Purchase Request Number> Window

4. Click the [**View Groups**] button to view members of a group.

*The **Groups (Read Only)** window displays.*

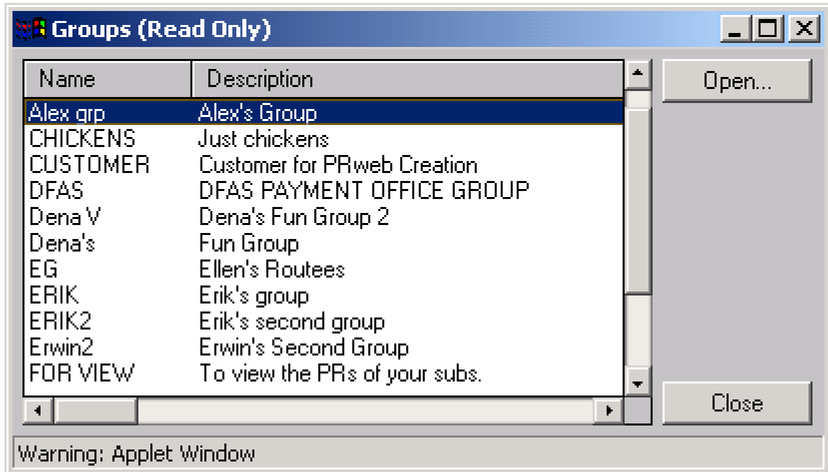

Figure 201: Groups (Read Only) Window

5. Highlight the desired group and click the [**Open**] button to view group members.

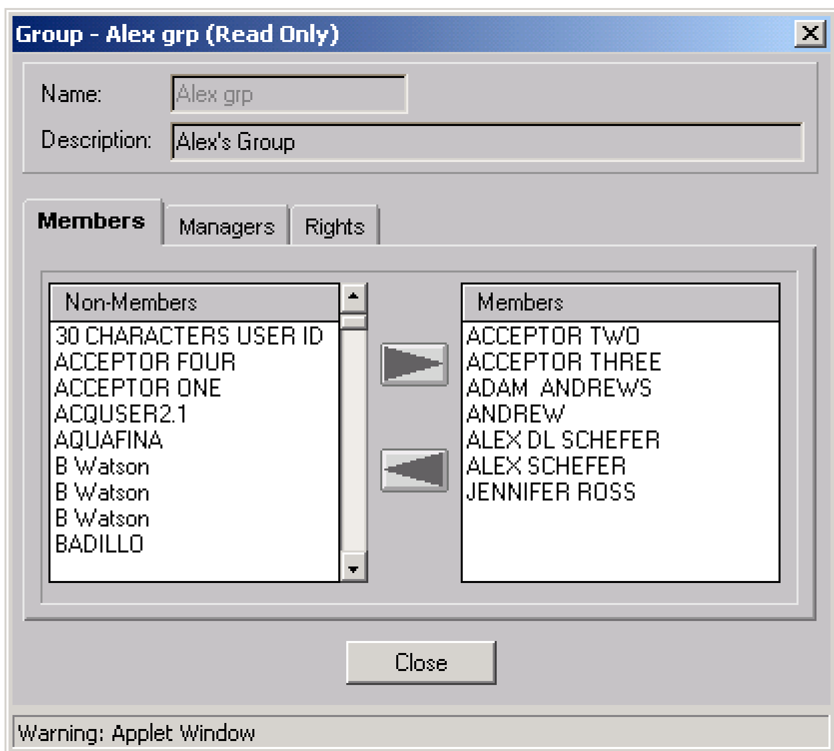

Figure 202: Group - <Name> (Read Only) Window

6. Click the [**Close**] button to return to the **Groups (Read Only)** window.

7. Click the [**Close**] button to return to the **Routing Sheet <Purchase Request Number>** window.

8. Select group(s) for the new routing sheet by highlighting a desired group from the **Group** list box and clicking the [▶] button.

Note: All groups that the *PRweb* System Administrator created displays in the **Group** list box. As groups are added to the routing sheet their group name displays in the order they were selected in the **Route To** list box. Groups must be placed in routing order on the routing sheet. The user in the zero position is the creator of the PR and cannot be deleted from the routing sheet.

Note: Groups may be removed from the routing sheet by highlighting the desired group from the **Route To** list box and clicking the [◀] button.

---

9. Click the [**Select**] button next to the ***Route to PD^2 User*** *field.*

The ***Select PD^2 User*** *window opens.*

Figure 203: Select PD^2 User Window

Note: When the user clicks the [**Select**] button next to the **Route to PD^2 User** field on a route sheet for a PR Mod, a message displays that indicates that the PR Mod will be routed to the PD^2 user that owns the conform copy of the PR.

---

10. Highlight the appropriate Contracting Officer.

11. Click the [**Select**] button.

    The PD^2 user selected displays in the ***Route to PD^2 User*** *field on the routing sheet.*

12. Click [**OK**] to initiate the routing sheet.

Create Routing Sheet – Template

PRweb employs the use of templates to facilitate the routing process. Users with appropriate security access can create individual route templates. Selecting the **Template** radio button activates the **Templates** drop-down list box and allows the user to display global and individual templates. The user can then select the desired template.

To create a route sheet using the **Templates** criteria:

1. From the *PRweb* user's desktop, highlight a PR.
2. From the menu, select **Purchase Request → Route**.

   *The **Routing Sheet - <Purchase Request Number>** window opens.*
3. Select the **Template** radio button.

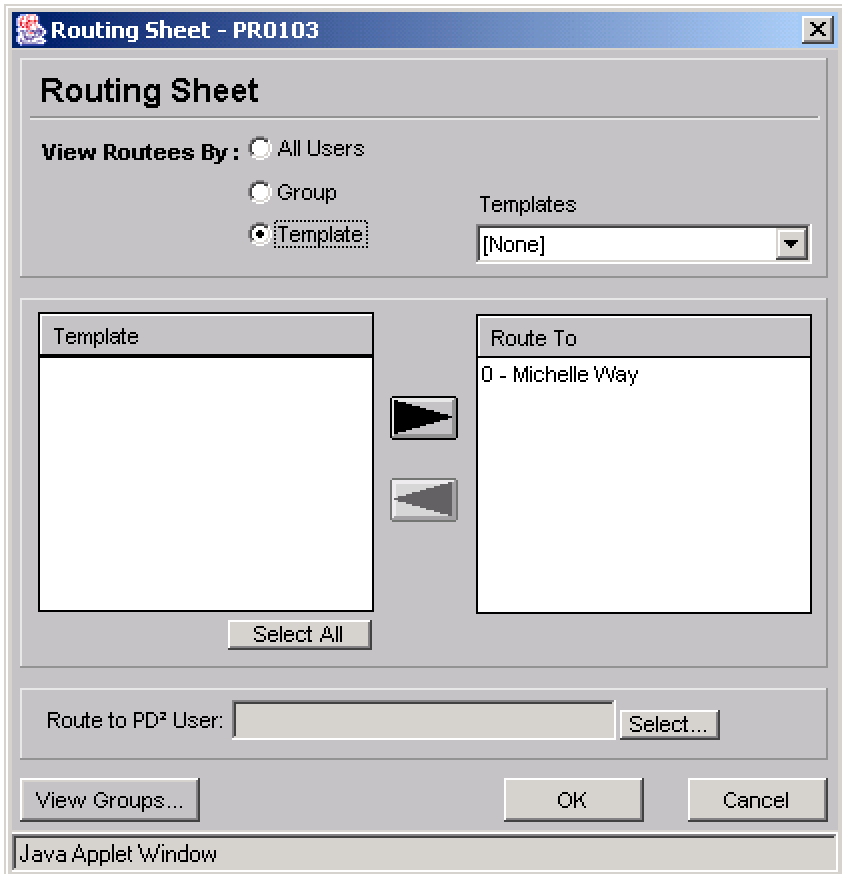

Figure 204: Routing Sheet - <Purchase Request Number> Window

4. Select the desired route template from the **Templates** drop-down list box.
5. Select routees for the new routing sheet by highlighting the desired members from the **Template** list box and clicking the [▶] **button**. Click the [**Select All**] button below the **Template** list box to select all members of the template.

Note: Routees may be removed from the routing sheet by highlighting the desired routee from the **Route To** list box and clicking the [◀] button.

6. Click the [**Select**] button next to the **Route to PD^2 User** field.

*The **Select PD^2 User** window opens.*

Figure 205: Select PD^2 User Window

Note: When the user clicks the [**Select**] button next to the **Route to PD^2 User** field on a route sheet for a PR Mod, a message displays that indicates that the PR Mod will be routed to the PD^2 user that owns the conform copy of the PR.

---

7. Highlight the appropriate Contracting Officer.

8. Click the [**Select**] button.

   *The PD^2 user selected displays in the **Route to PD^2 User** field on the routing sheet.*

9. Click [**OK**] to initiate the routing sheet.

Editing a Routing Sheet

PRweb users with appropriate security access may edit (add and remove users from) an existing routing sheet.

To edit a routing sheet:

1. From the *PRweb* user's desktop, open a PR.

   PRweb users can edit routing sheets for PRs that reside in their **Inbox** and **Outbox**.

2. From the menu, select **File → Route**.

*The **Routing Sheet** window opens.*

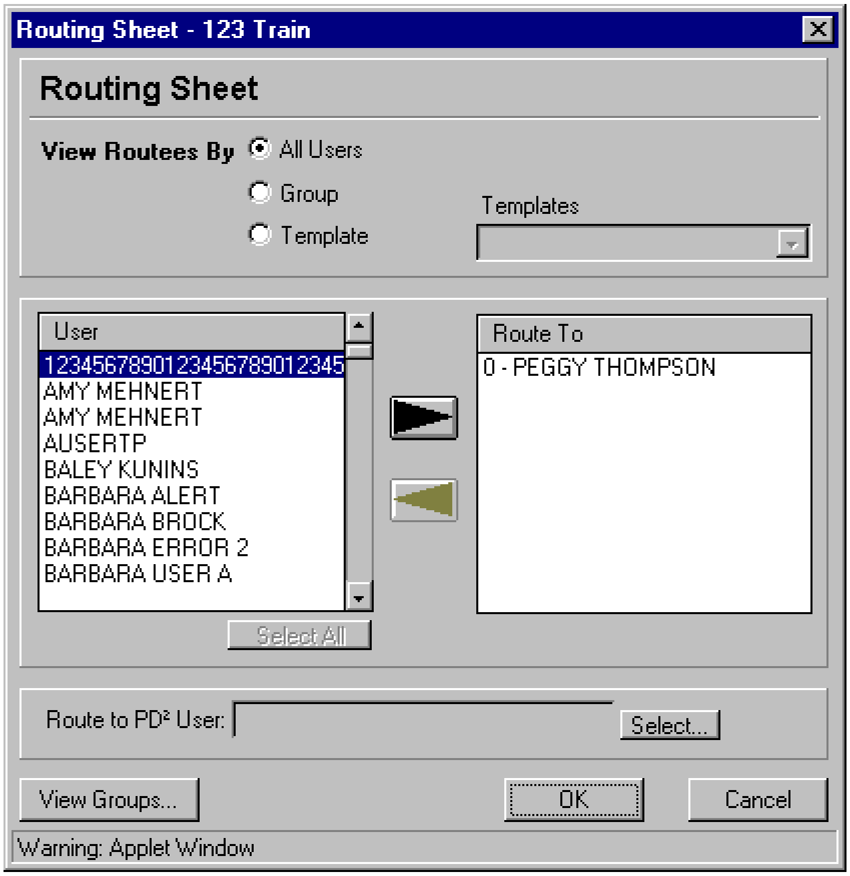

Figure 206: Routing Sheet - <Purchase Request Number> Window

3. Select additional routees for the routing sheet by highlighting desired users or groups from the **User, Group,** or **Template** list box, respectively, and clicking the [▸] button.

4. Remove routees from the routing sheet by highlighting desired users or groups from the **Route To** list box and clicking the [◂] button.

Note: Edits must reflect the appropriate route sequence. For example, to add a routee before an existing routee, remove the existing routee, add the new routee and then re-add the original routee. The creator of the PR may not be removed from the routing sheet.

---

5. Change the PD^2 user designated to receive the PR in the **Route to PD^2 User** field if necessary.

6. Click [**OK**] to save changes to the routing sheet.

Creating a Non-Custom Routing Sheet

Users with non-custom routing privileges may create routing sheets based only on defined templates. Users do not have custom routing privileges if they are members of security groups that cannot custom route. These security groups can have one or more routing templates associated with them. The *PRweb* System Administrator maintains security groups.

Creating Template Route Sheet by Selection

Users with non-custom routing privileges may be assigned to a security group with more than one routing template associated with it. In this case the user may choose the routing template to route a PR.

To create a routing sheet:

1. From the *PRweb* user's desktop, highlight a PR.

2. From the menu, select **Purchase Request → Route**.

   *The **Routing Sheet - <Purchase Request Number>** window opens.*

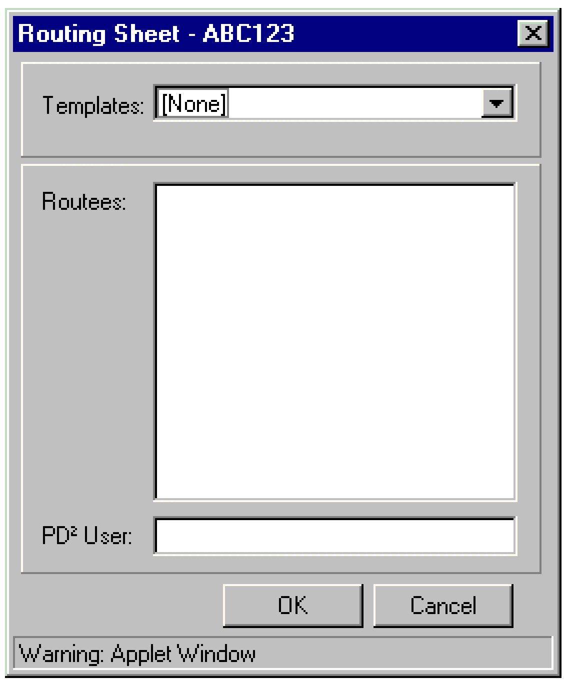

Figure 207: Routing Sheet - <Purchase Request Number> Window

3. Select the desired route template from the **Templates** drop-down list box.

   *The members of the template display in the **Routees** list. The PD^2 user associated with the template displays in the **PD^2 User** field.*

4. Click [**OK**] to save the routing sheet.

Creating Template Route Sheet by Non-Selection

Users without custom routing privileges may be assigned to a security group with only one routing template associated with it. In this case the PR is automatically routed when the user chooses to route the PR.

To create a routing sheet:

1. From the *PRweb* user's desktop, highlight a PR.

2. From the menu, select **Purchase Request → Route**.

   *The PR is routed automatically. The **Information** window opens.*

Figure 208: Information Window

3. Click [**OK**] to return to the *PRweb* desktop.

Approvals

The *PRweb* module facilitates the electronic approval of PRs and PR Mods. When a PR or PR Mod is received in a user's **Inbox**, that user can review and approve the document, reject the document, or designate contingent approval of the document.

Approving a Purchase Request or PR Mod

PRweb users may electronically approve a PR or PR Mod. An approved PR or PR Mod is removed from the user's desktop and continues on through the routing process to the next user designated on the routing sheet.

To approve a PR or PR Mod:

1. From the user's desktop, highlight the desired PR or PR Mod contained in the **Inbox**.

2. From the menu, select **File → Approve**.

*The **Approval - <Purchase Request Number>** window opens.*

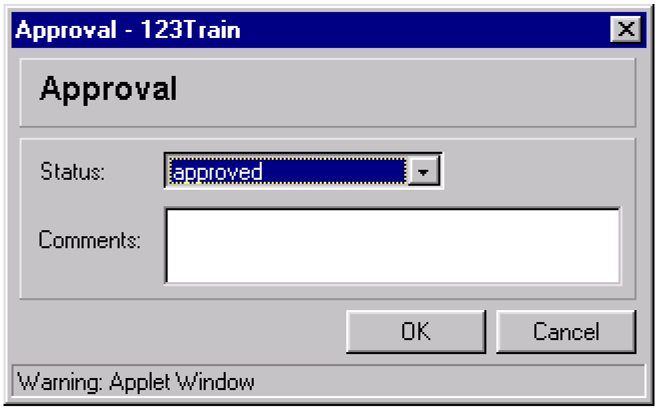

Figure 209: Approval - <Purchase Request Number> Window

3. Select "approved" from the **Status** drop-down list box.

4. Enter comments in the **Comments** field, as necessary.

Note: The **Comments**, **Approval Date**, and **Status** display in the Approval History. For more information regarding Approval History, refer to this chapter on "View Approval History".

5. Click [**OK**] to approve the PR.

   *The PR displays in the **Inbox** of the next user designated on the routing sheet. If there are no more PRweb users on the routing sheet, the PR displays in the **Inbox** of the PD^2 user designated on the routing sheet.*

Note: An e-mail alert is sent to all users on the routing sheet when a PR is marked "Rejected" or "Contingent". The e-mail contains the comments entered in the **Approval** window.

Rejecting a Purchase Request

PRweb users may reject a PR or PR Mod during the approval process. The rejected document continues on through the routing process to the next user designated on the routing sheet. A copy of the rejected document remains in the Rejecting Authority's **Inbox** as a reminder that the user has a rejected document that requires change, either by the user, the creator of the document or another user on the routing sheet. The PR or PR Mod is not sent to PD^2 until it is fully approved.

To reject a PR or PR Mod:

1. From the user's desktop, highlight the desired PR or PR Mod contained in the **Inbox**.

2. From the menu, select **File → Approve**.

*The **Approval - <Purchase Request Number>** window opens.*

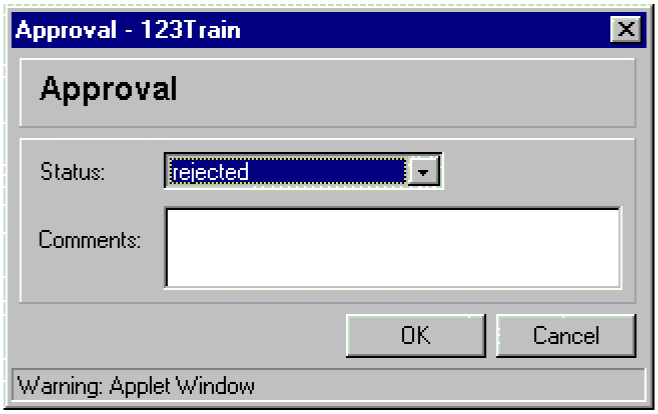

Figure 210: Approval - <Purchase Request Number> Window

3. Select **"rejected"** from the **Status** drop-down list box.

4. Enter comments in the **Comments** field, as necessary.

Note: The **Comments**, **Approval Date**, and **Status** display in the Approval History. For more information refer to this chapter on "View Approval History".

5. Click [**OK**] to reject the PR or PR Mod.

   The creator of the PR or PR Mod receives an e-mail alert. The document remains in the **Inbox** of the rejecting authority. If there are no more *PRweb* users on the routing sheet, the document remains in *PRweb* until the rejecting authority approves the PR. At that time, the document displays in the **Inbox** of the PD^2 user designated on the routing sheet.

Note: An e-mail alert is sent to all users on the routing sheet when the document is marked "Approved", "Rejected" or "Contingent".

Designating Contingent Approval of a Purchase Request

PRweb users may give contingent approval of a PR or PR Mod. Contingent approval of the document does not stop the approval process. The doucment continues on through the routing process to the next user designated on the routing sheet. A copy of the document remains in the approving authority's *Inbox* as a reminder that the user has a PR or PR Mod that needs to be changed, either by the user, the creator of the document or another user on the routing sheet. The document is not sent to PD^2 until it is fully approved.

To give contingent approval of a PR or PR Mod:

1. From the user's desktop, highlight the desired PR or PR Mod contained in the **Inbox**.

2. From the menu, select **File → Approve.**

*The **Approval - <Purchase Request Number>** window opens.*

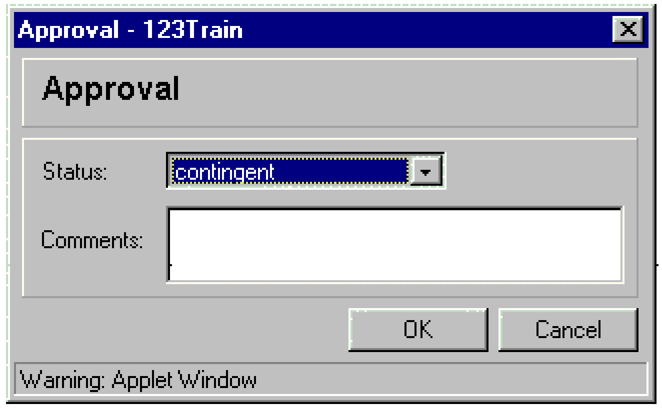

Figure 211: Approval - <Purchase Request Number> Window

3. Select **"contingent"** from the **Status** drop-down list box.

4. Enter comments as necessary in the **Comments** field.

Note: The **Comments**, **Approval Date** and **Status** display in the Approval History. For more information regarding Approval History, refer to this chapter on "View Approval History".

5. Click [**OK**] to authorize contingent approval of a PR or PR Mod.

   The creator of the PR or PR Mod receives an e-mail alert. The document remains in the Inbox of the user who gave contingent approval of the document. If there are no more *PRweb* users on the routing sheet, the document remains in *PRweb* until the contingent approver approves the document. At that time, the document displays in the Inbox of the PD^2 user designated on the routing sheet.

Note: An e-mail alert is sent to all users on the routing sheet when a document is marked "Approved", "Rejected" or "Contingent".

View Approval History

PRweb users may view the Approval History of a PR or a PR Mod that currently resides on their desktop. The Approval History displays the approval status and date for all users assigned to the routing sheet and any comments that may have been included. The list displays in chronological order with the most recent approver as the last entry. If the document is returned routed from PD^2 the status shows as return routed.

To view Approval History:

1. From the user's desktop, highlight a PR or PR Mod.

2. From the menu, select **Purchase Request → View Approval History**.

*The **Approval History - <Purchase Request Number>** window opens.*

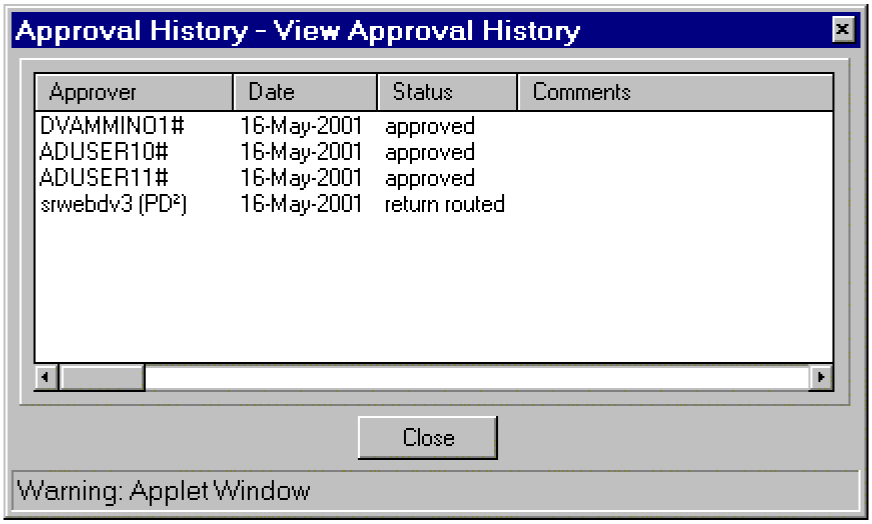

Figure 212: Approval History - <Purchase Request Number> Window

---

Note: Using the Approval History is an effective way of determining the location of a given PR or PR Mod.

---

3. Click the [**Close**] button to close the **Approval History** window.

Chapter 10: Reports

> **In This Chapter…**
>
> Using the Reports function described in this chapter, you can:
>
> - View PR Status Reports
> - Generate pre-formatted Standard Reports

PR Status Report

PRweb users can generate PR status reports to identify the procurement stage for a given requirement. The *PRweb* module directly interfaces with PD^2 and pulls up-to-date information for the requesting agent. The user can view the PR Modification, milestone plan, solicitation, and award for a given requirement.

To generate a **PR Status Report**:

1. From the menu, select **Purchase Request → PR Status Report**.

   *The **PR Status Report** window opens.*

Note: The **PRweb**, **All**, and **Group(s)** radio buttons on the **PR Status Report** window are based on rights assigned to a user at the group or user level by the System Administrator and may not display for every user.

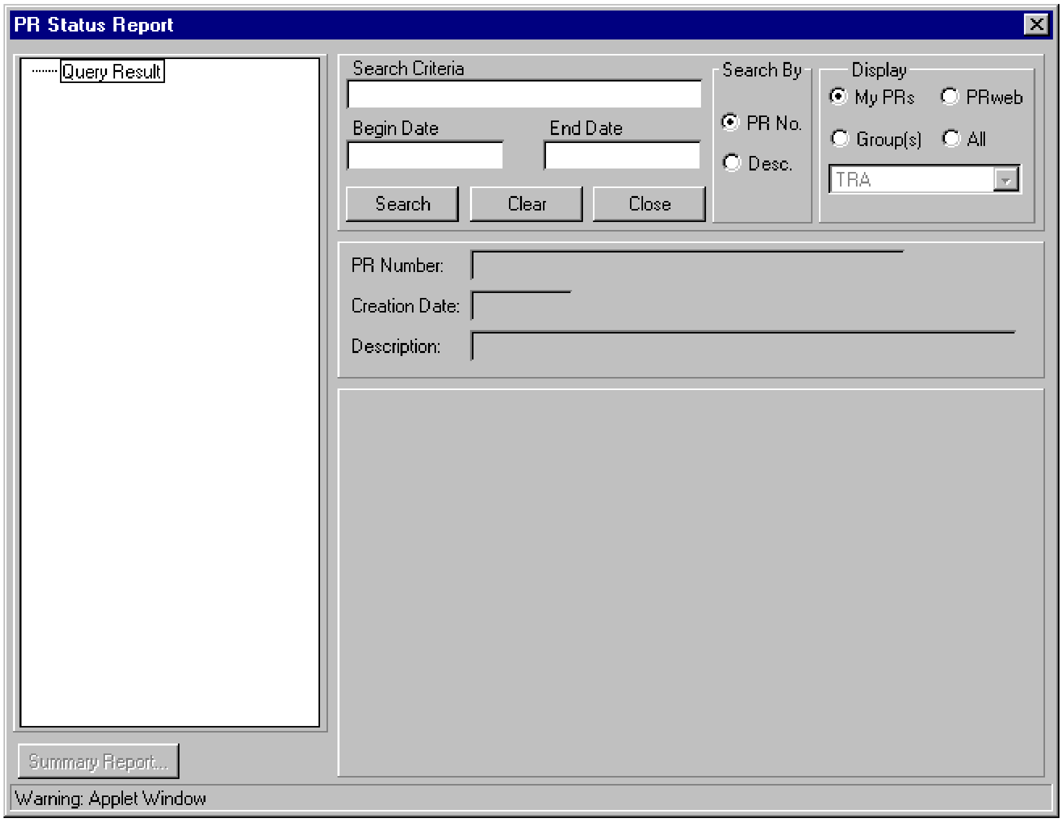

Figure 213: PR Status Report Window

2. Select the appropriate **Search By** radio button.

PR No.: The **PR No.** radio button allows the *PRweb* user to search by a specific purchase request number. Users can enter the first character of the purchase request number in the **Search Criteria** field, followed by the "%" sign, and all PRs beginning with that character that also meet the other criteria designated in the **PR Status Report** window display.

Desc.: The **Desc.** radio button allows the *PRweb* user to search by a specific PR description. Users can enter the first character of the PR description in the **Search Criteria** field, followed by the "%" sign, and all PRs beginning with that character that also meet the other criteria designated display.

3. Select the appropriate **Display** radio button.

My PRs: The **My PRs** radio button allows the user to display only PRs that were created by the user and reside in PD^2. PRs that are return routed from PD^2 do not display.

PRweb: The **PRweb** radio button allows the user to display PRs that were created by any *PRweb* user and reside in PD^2. The **PRweb** radio button is visible only if the user has rights.

All: The **All** radio button allows the user to display all PRs that reside in PD^2 including PRs created in *PRweb*. The **All** radio button is visible only if the user has rights.

Group(s): The **Group(s)** radio button allows the user to display the PRs that reside in PD^2 and were created by members of the group(s) she/he manages. The **Group(s)** radio button enables a drop-down list box listing all the groups the user manages. If the non-administrative user manages more than one group, the drop-down list box includes the "All My Groups" option. The drop-down list box is disabled if the user is the manager of only one group. The **Group(s)** radio button and drop-down list box are not visible to a non-administrative user that is not the manager of any groups.

4. Enter the **Search Criteria** followed by the universal search symbol (%).

Note: For more information regarding the use of the **Search Criteria** field, refer to "Search Function" section in *Chapter 2: PRweb Desktop*.

---

5. Enter a beginning date in the **Begin Date** field.

   Entering a Begin Date further qualifies the search to find only those PRs that were created on or after the entered date. Users can enter the date manually or utilize the **Auto-Calendar** feature.

6. Enter an end date in the **End Date** field.

   Entering an End Date further qualifies the search to find only those PRs that were created on or before the entered date. Users can enter the date manually or utilize the **Auto-Calendar** feature.

Note: Both the **Begin Date** and **End Date** fields are required.

---

7. Select the [**Search**] button to view the results of the search.

Query results display in the query box on the left side of the window.

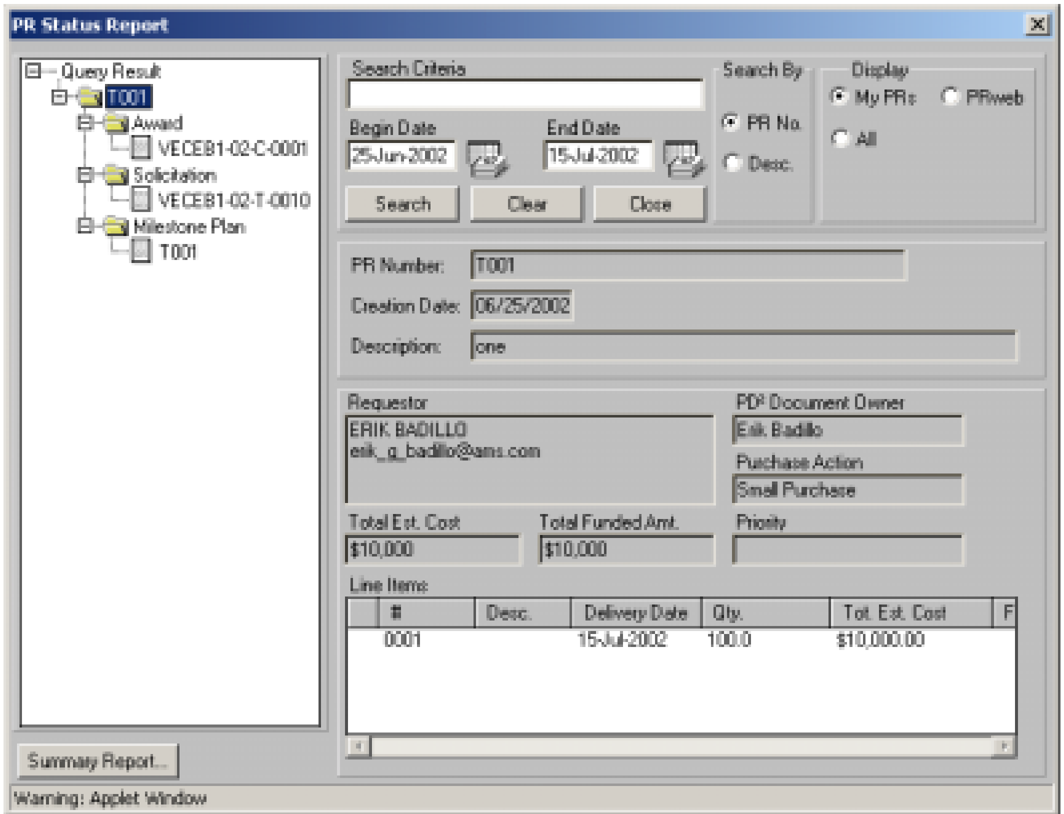

Figure 214: PR Status Report Window

8. Double-click a PR beneath the **Query Results** icon.

Note: Each result contains a parent PR folder with three associated folders: Award, Solicitation, and Milestone Plan.

9. Open a sub-directory folder and highlight the associated object number to display status information.

Note: Selected object information displays in the lower right corner of the **PR Status Report** window. Only sub-directory folders with a plus sign **(+)** next to them can be opened.

10. Click the [**Summary Report**] button to view the **Summary Report** window.

*The **Summary Report** window opens.*

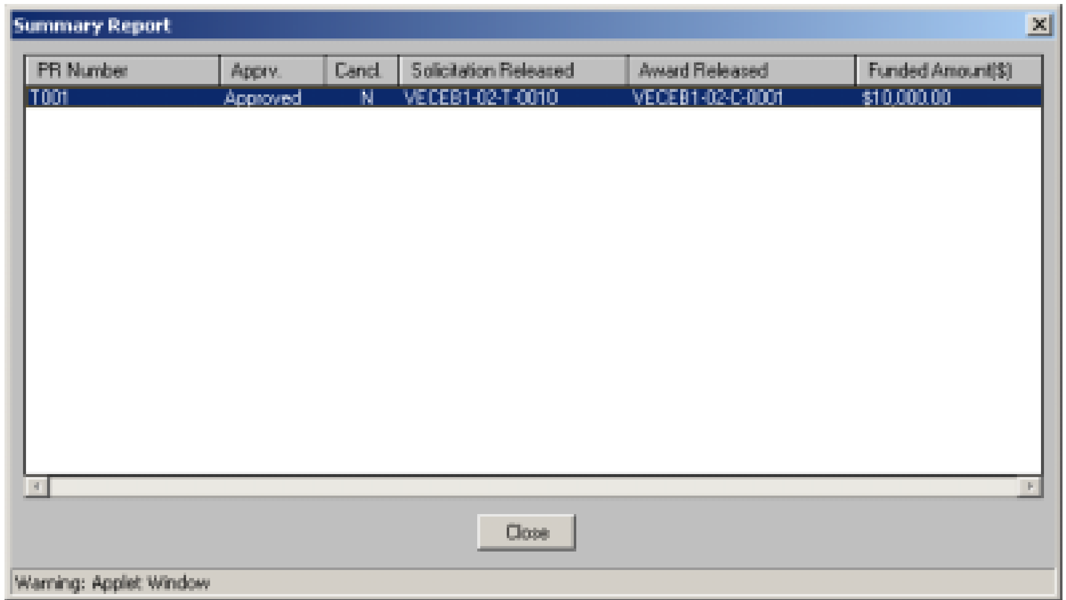

Figure 215: Summary Report Window

Note: The **Summary Report** window provides a snap-shot of the procurement actions for all PRs displayed in the PR status query results.

Note: For a quick way to search a list, refer to the 'Searching Within A List" section in *Chapter 2: PRweb Desktop*.

---

11. Click the [**Close**] button to return to the **PR Status Report** window.

12. Click the [**Clear**] button to clear the criteria and create another query.

13. Click the [**Close**] button.

Standard Reports

PRweb users can generate pre-formatted reports, pulling information directly from the *PRweb* and PD^2 databases. *PRweb* users can request custom reports from American Management Systems (AMS). Currently, there are three standard reports: **PRweb Locator Report**, **View Canceled PR Status Report** and **View Open PR Status.**

PRweb Locator Report

1. From the menu, select **Purchase Request → Standard Reports**.

   *The **Standard Reports** window opens.*

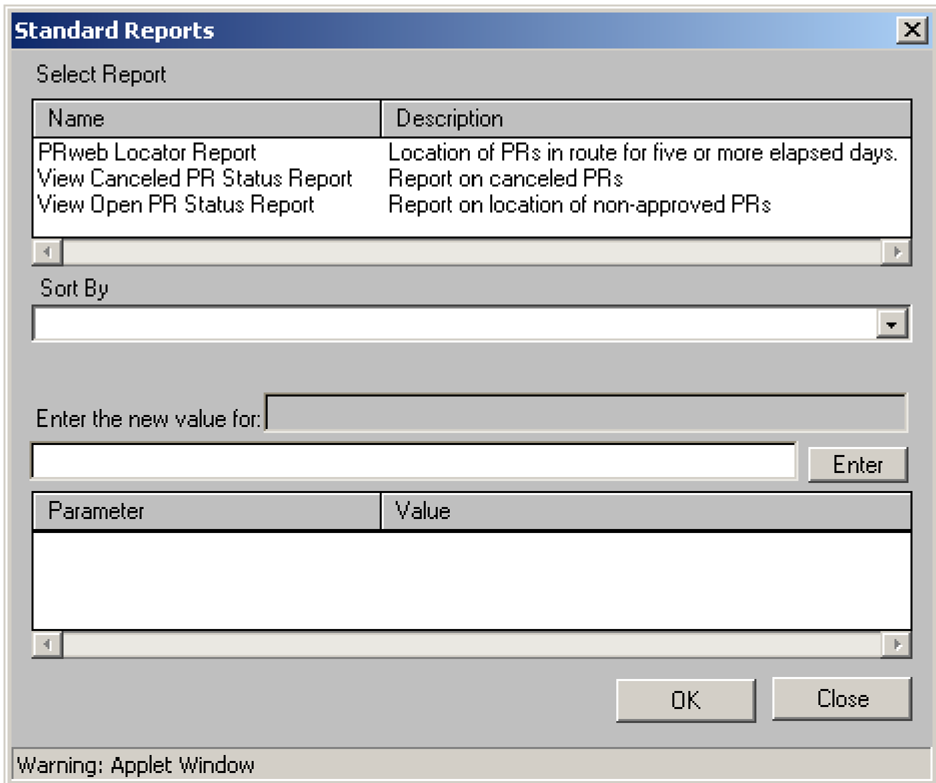

Figure 216: Standard Reports Window

2. Double-click the **PRweb Locator Report** from the **Select Report** panel.

Note: The **PRweb Locator Report** provides a list of all PRs that have been in *PRweb* for a minimum of five days. The report displays associated information for each of these PRs (i.e., PR number, description, creator, and creation date) including the total of days in route and in *PRweb*, the name of the user and/or group who had the PR the longest and number of days in the longest station. The report also displays the current station and number of days in that station.

---

3. Choose the desired **Sort By** option from the drop-down list box.

   The **Sort By** drop-down list box allows the *PRweb* user to sort the information in the report by the text in any data column that is available in the **Sort By** drop-down list box.

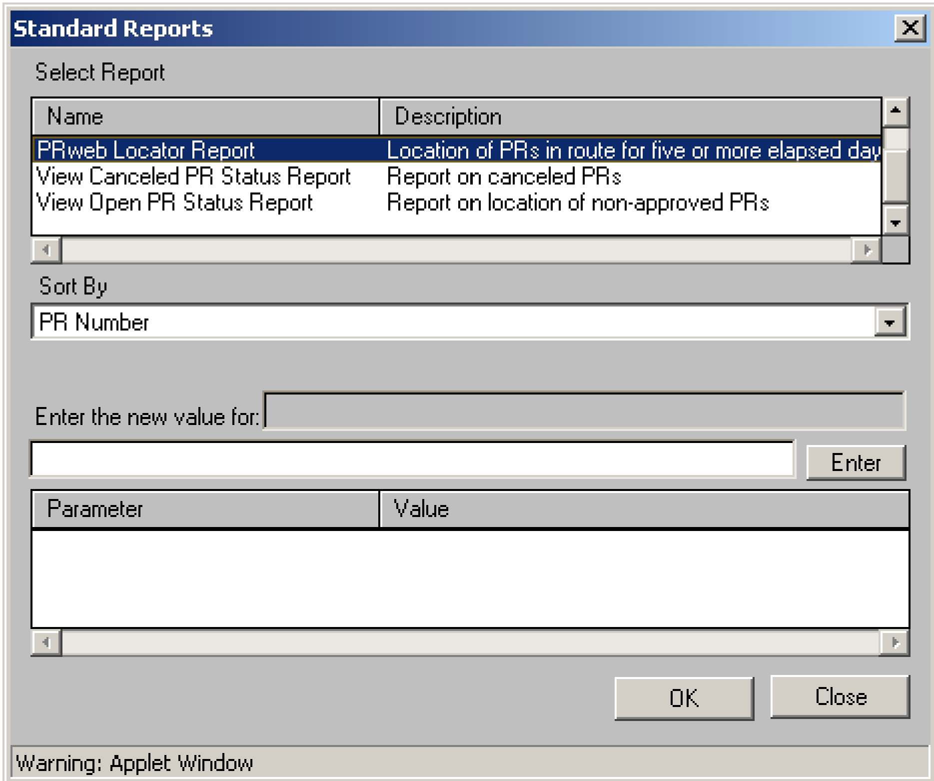

Figure 217: Standard Reports Window

4. Click [**OK**] to generate the Report.

*The **PRweb Locator Report** window opens.*

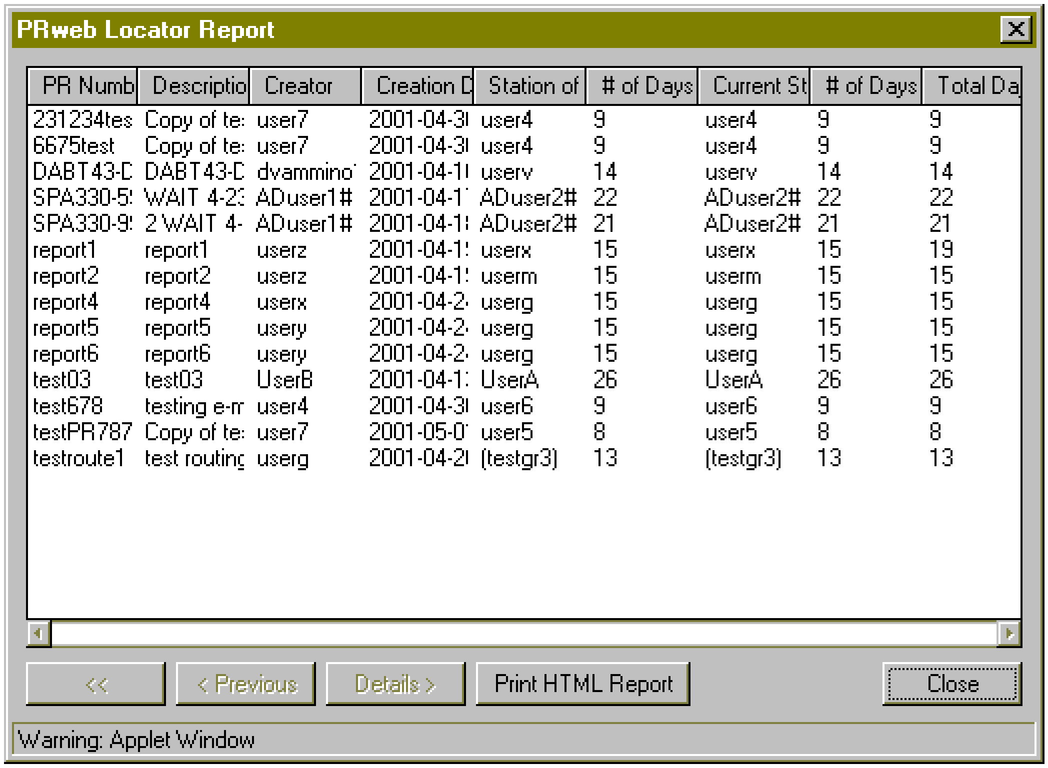

Figure 218: PRweb Locator Report

PR Number	The number designated in the **Purchase Request Number** field of the PR.
Description	The full description contained in the **Description** field.
Creator	The creator of the PR.
Creation Date	The creation date of the PR.
Station of Longest Stay	The name of the user who had the PR in his/her *Inbox* the longest.
# of Days in Longest Station	The number of days that the PR was in the longest station user's *Inbox*.
Current Station	The name of the user who currently has the PR in his/her *Inbox*.
# of Days in Current Station	The number of days that the PR has been in the user's or group's *Inbox*.
Total Days in Route	The total number of days, from the route date to the report generation date, that the PR has been in *PRweb*.

Note: The user can adjust the width of each column by clicking on the line separating each column and holding down the left mouse button and dragging the cursor to the right or left.

Print HTML Report: When a user clicks the [**Print HTML Report**] button the **Custom Reports – Internet Explorer** window opens allowing the user to print the PRweb Locator Report.

Details: The [**Details**] button allows the user to view details associated with a PR. The [**Details**] button is enabled only if there are additional details associated with the report currently displayed on the screen. A user selects a row from report in the window and clicks the [**Details**] button to view the details.

Previous: The [**Previous**] button allows the user to return to the previous **Standard Report** window. The [**Previous**] button is enabled only if there is any preceding information. A user selects the [**Previous**] button to display the information previously viewed.

<<: Press the [<<] button to return to the **Standard Reports** window.

5. Click the [**Close**] button to return to the **Standard Reports** window.

View Canceled PR Status Report

The **View Canceled PR Status** report provides a list of all PRs created in *PRweb* that have been canceled in PD[2].

1. From the menu, select **Purchase Request → Standard Reports**.

   The ***Standard Reports*** *window opens.*

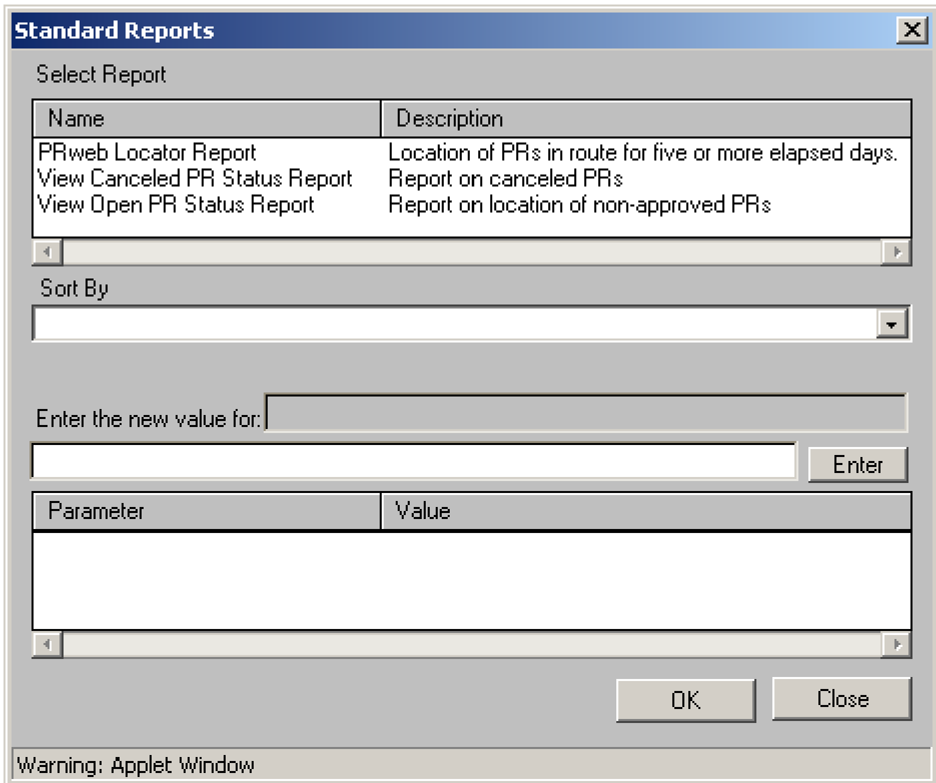

Figure 219: Standard Reports Window

2. Double-click the **View Canceled PR Status** from the **Select Report** panel.

Note: The **View Canceled PR Status Report** provides a list of all PRs created in *PRweb* that have been canceled in PD[2].

3. Choose the desired **Sort By** option from the drop-down list box.

   The **Sort By** drop-down list box allows the *PRweb* user to sort the information in the report by the text in any data column that is available in the **Sort By** drop-down list box.

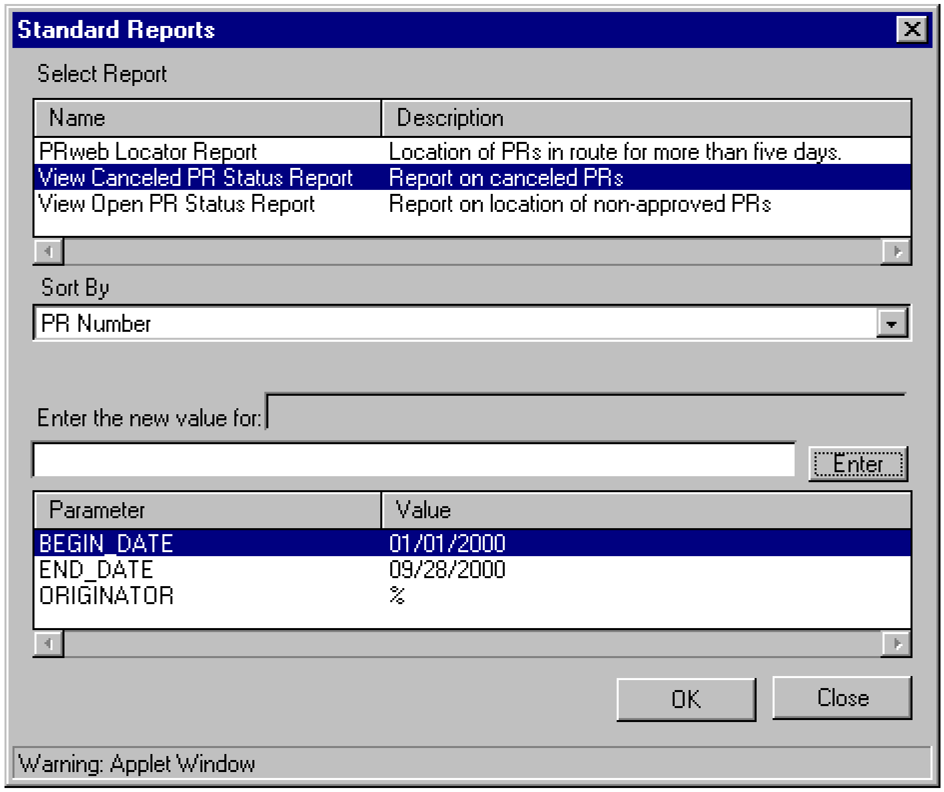

Figure 220: Standard Reports Window

4. Double-click the desired **Parameter** from the panel.

Note: The **Parameter** table allows the user to further define the search results. For example, if a user wanted to view PRs created on a specific day, the user can select the BEGIN_DATE and END_DATE parameter from the table and that date can be entered in the **Enter the new value for** box. If the user changes the Parameter, the user must click the [**Enter**] button for changes to take effect.

---

5. Click [**OK**] to generate the report.

*The **View Canceled PR Status Report** window opens.*

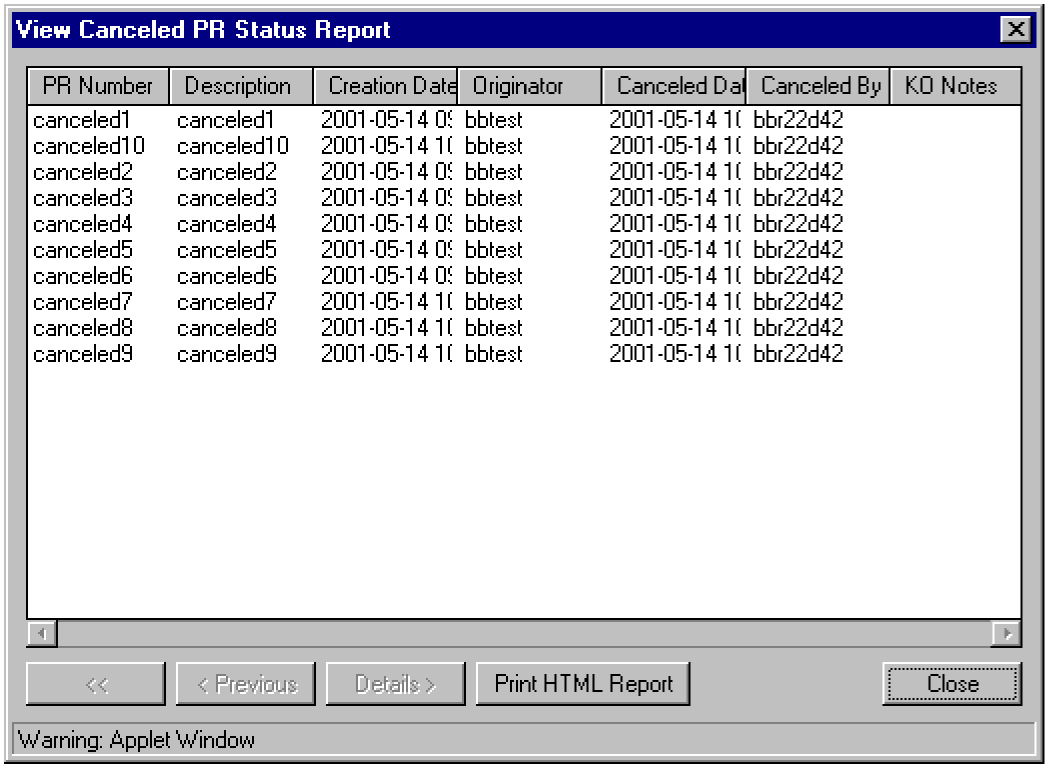

Figure 221: View Canceled PR Status Window

Note: The user can adjust the width of each column by clicking on the line separating each column and holding down the left mouse button and dragging the cursor to the right or left.

Note: The user can click the [<<], [**Previous**], [**Details**], or [**Print HTML Report**] button to aid in the report generation process.

---

6. Click the [**Close**] button to return to the **Standard Reports** window.

View Open PR Status Report

The **View Open PR Status Report** provides a list of all PRs currently in *PRweb* and their current location.

1. From the menu, select **Purchase Request → Standard Reports**.

*The **Standard Reports** window opens.*

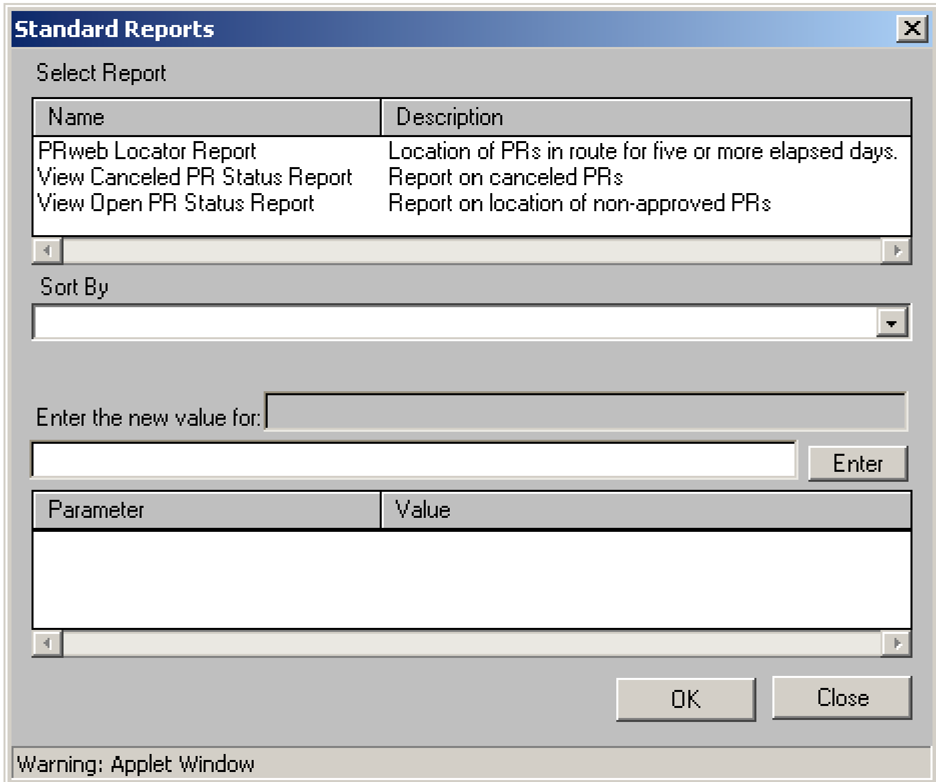

Figure 222: Standard Reports Window

2. Double-click the **View Open PR Status Report** from the **Select Report** panel.

3. Choose the desired **Sort By** option from the drop-down list box.

   The **Sort By** drop-down list box allows the *PRweb* user to sort the information in the report by the text in any data column that is available in the **Sort By** drop-down list box.

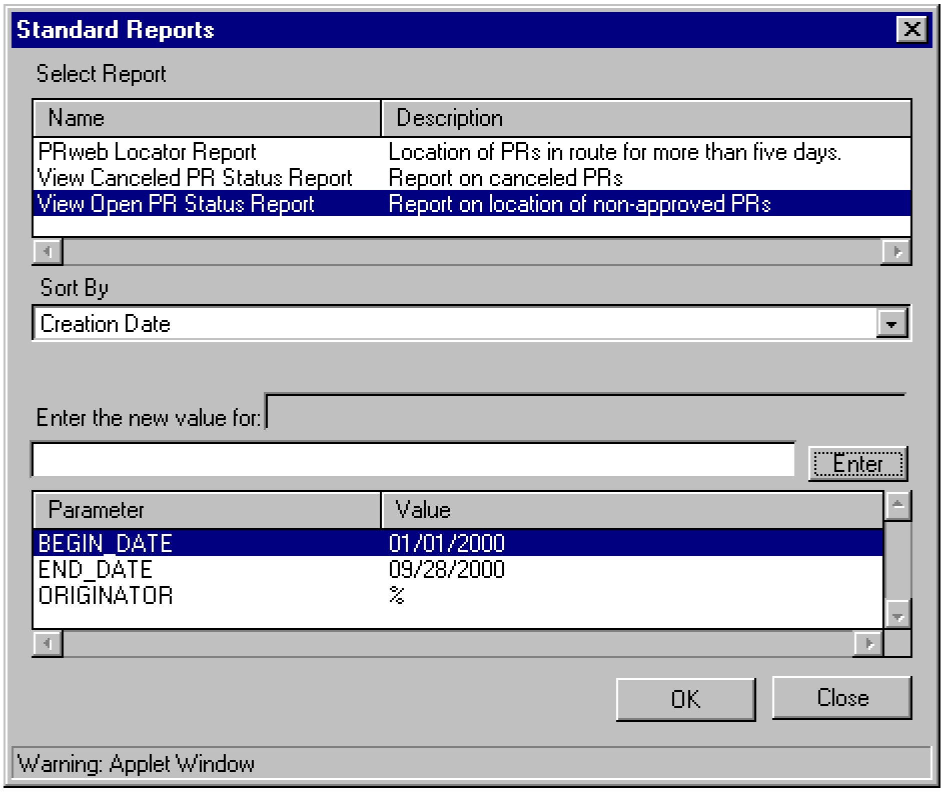

Figure 223: Standard Reports Window

4. Double-click the desired **Parameter** from the panel.

Note: The **Parameter** table allows the user to further define the search results. For example, if a user wanted to view PRs created on a specific day, the user can select the BEGIN_DATE and END_DATE parameter from the table and that date can be entered in the **Enter the new value for** box. If the user changes the Parameter, the user must click the [**Enter**] button for changes to take effect.

---

5. Click [**OK**] to generate the report.

*The **View Open PR Status Report** window opens.*

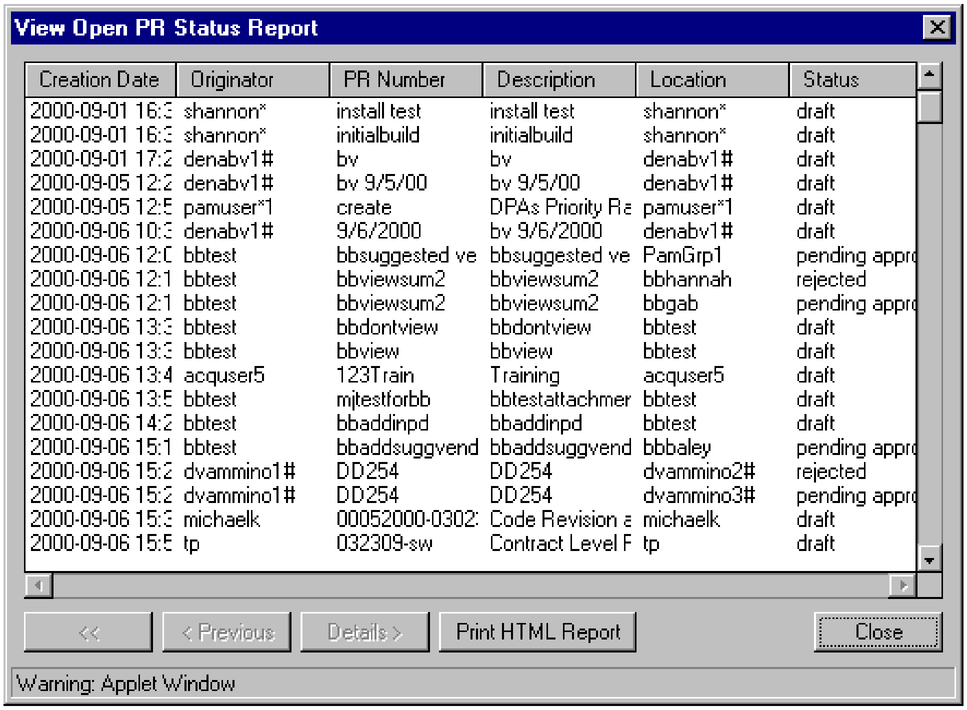

Figure 224: View Open PR Status Window

Note: The user can adjust the width of each column by clicking on the line separating each column and holding down the left mouse button and dragging the cursor to the right or left.

Note: The user can click the [<<], [**Previous**], [**Details**], or [**Print HTML Report**] button to aid in the report generation process. Click the [**Close**] button to return to the **Standard Reports** window.

Chapter 11: Transfer Document

The Transfer Document functionality allows a *PRweb* user with managerial rights to transfer PRs and PR Mods from one managed user to another managed user. The manager is able to transfer PRs and PR Mods that reside in a managed user's *Drafts*, *Inbox*, and *Outbox* folders. However, PRs or PR Mods are not available for document transfer if the document resides in the *Inbox* folder and has been routed to a group.

In This Chapter…

Using the Transfer Document feature described in this chapter, you can:

- Transfer ownership of PRs or PR Mods from one manager user to another managed user

Transfer a Document

To transfer a document:

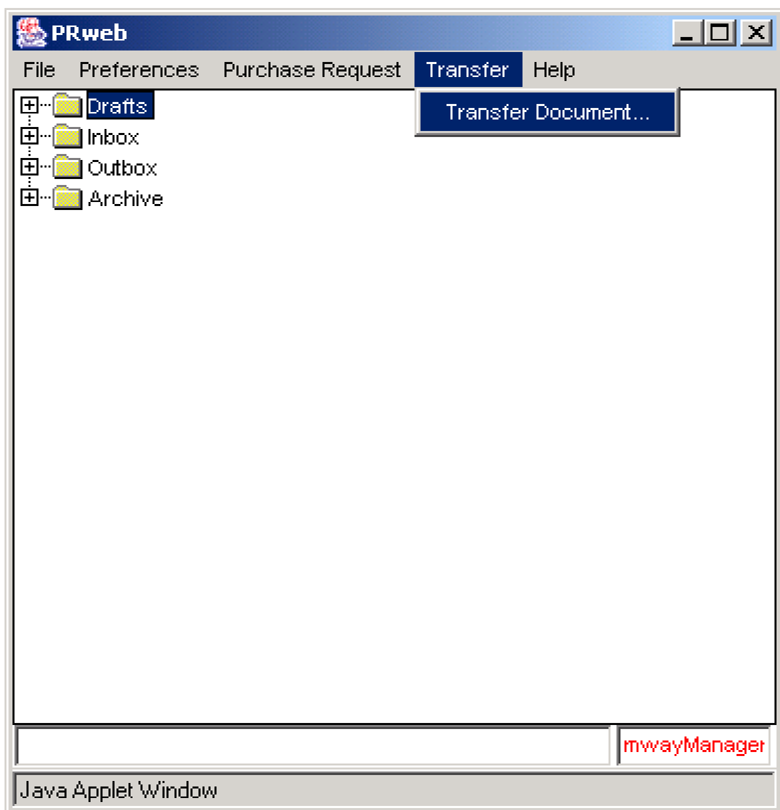

Figure 225: PRweb Transfer Menu – Manager Desktop

1. From the menu, select **Transfer → Transfer Documents**.

*The **Select Managed Users** window opens.*

Note: The **Managed Users** list box displays all the users that the current user manages.

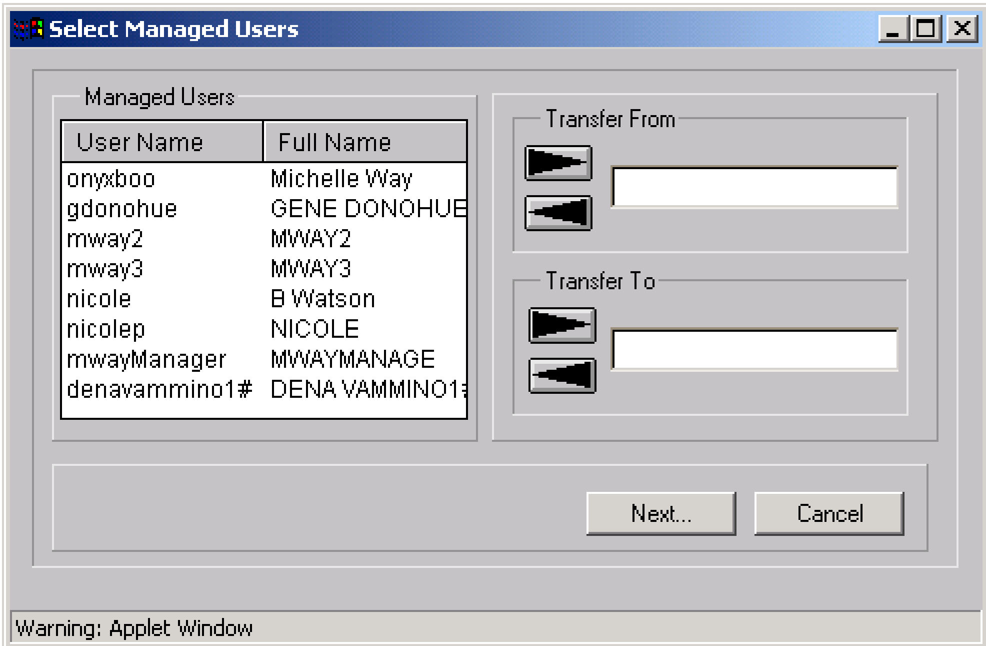

Figure 226: Select Managed Users Window

2. Select **Transfer From** user by highlighting the user from the **Managed Users** list box and clicking the [▶] **button**.

   *The selected user's Full Name displays in the **Transfer From** field as read-only.*

Note: The selected user may be removed from the **Transfer From** field by clicking the [◀] button.

3. Select **Transfer To** user by highlighting the user from the **Managed Users** list box and clicking the [▶] **button**.

   *The selected user's Full Name displays in the **Transfer To** field as read-only.*

Note: The selected user may be removed from the **Transfer To** field by clicking the [◀] button.

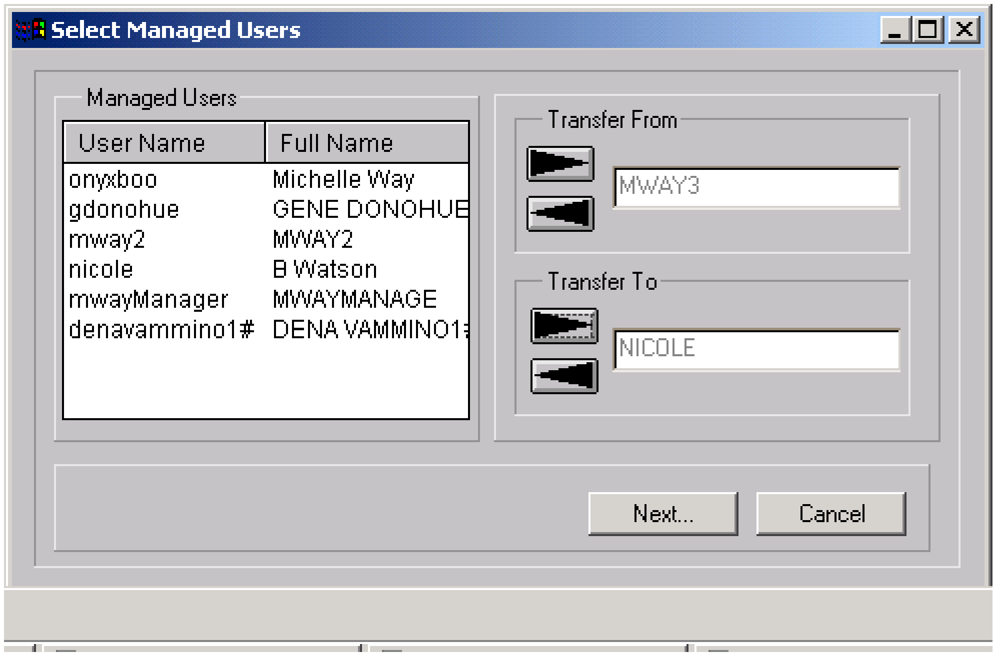

Figure 227: Select Managed Users Window

4. Click the [**Next**] button to search for documents.

   *The **Document Search** window opens.*

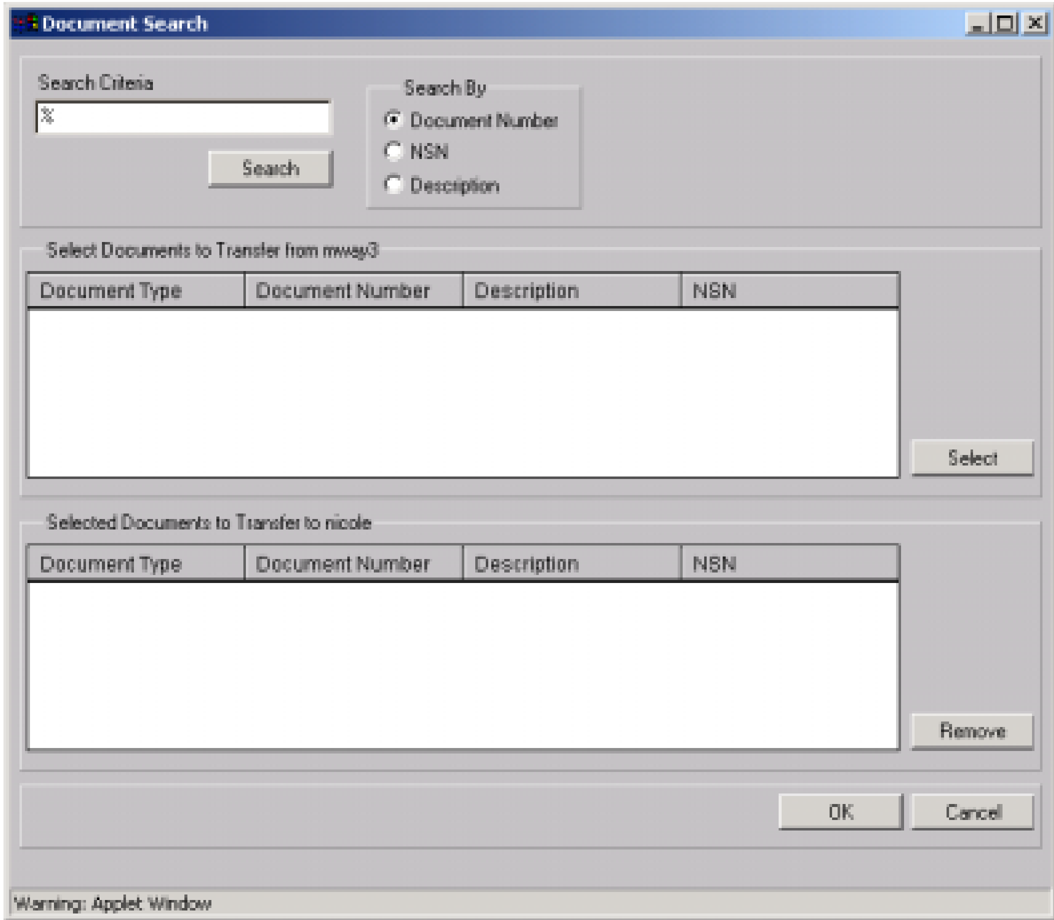

Figure 228: Document Search Window

5. Enter values in the **Search Criteria** field.
6. Select appropriate **Search By** radio button.
7. Click the [**Search**] button.

   The search results display in the ***Select Documents to Transfer from <Transfer From User Name>*** *list box.*

Note: Only PRs and PR Mods contained in the **Transfer From** user's *Drafts*, *Inbox*, and *Outbox* folders display. Documents contained in the *Archive* folder are not available for transfer. In addition, PRs and PR Mods are not available for document transfer if the document resides in the *Inbox* folder and has been routed to a group of users.

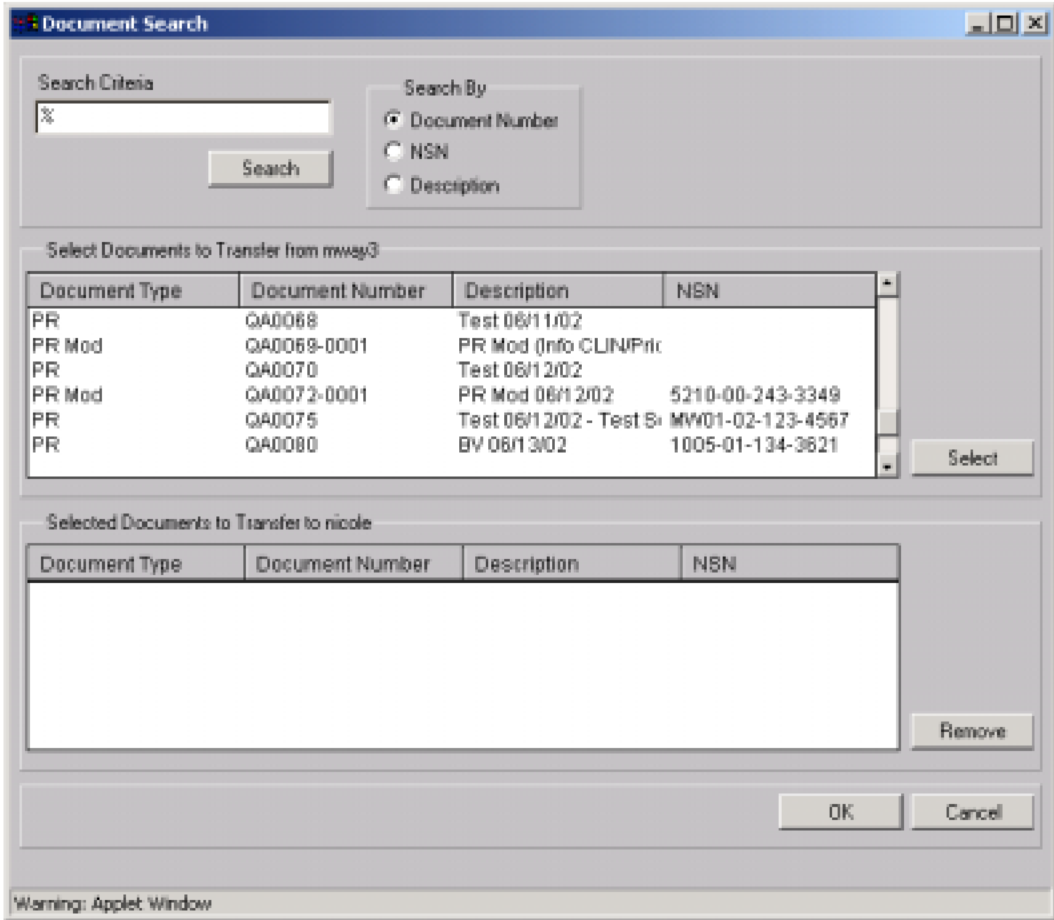

Figure 229: Document Search Window

8. Select the documents to be transferred by highlighting the desired documents from the **Select Documents to Transfer from <Transfer From User Name>** list box and clicking the [**Select**] button.

   *The selected documents displays in the **Selected Documents to Transfer to <Transfer To User Name>** list box.*

Note: Multiple documents can be selected or removed by using the <**Shift**> or <**Ctrl**> keys. Also, the manager is able to double-click a document to move it back and forth between the **Select Documents to Transfer from <Transfer From User Name>** list box and the **Selected Documents to Transfer to <Transfer To User Name>** list box.

Note: A document may be removed from the **Selected Documents to Transfer to <Transfer To User Name>** list box by highlighting the desired document and clicking the [**Remove**] button. The removed document will display in the **Select Documents to Transfer from <Transfer From User Name>** list box**.**

Note: Documents that display in the **Selected Documents to Transfer to <Transfer To User Name>** list box remain, unless removed. Thus, the manager is able to perform multiple searches in order to select documents.

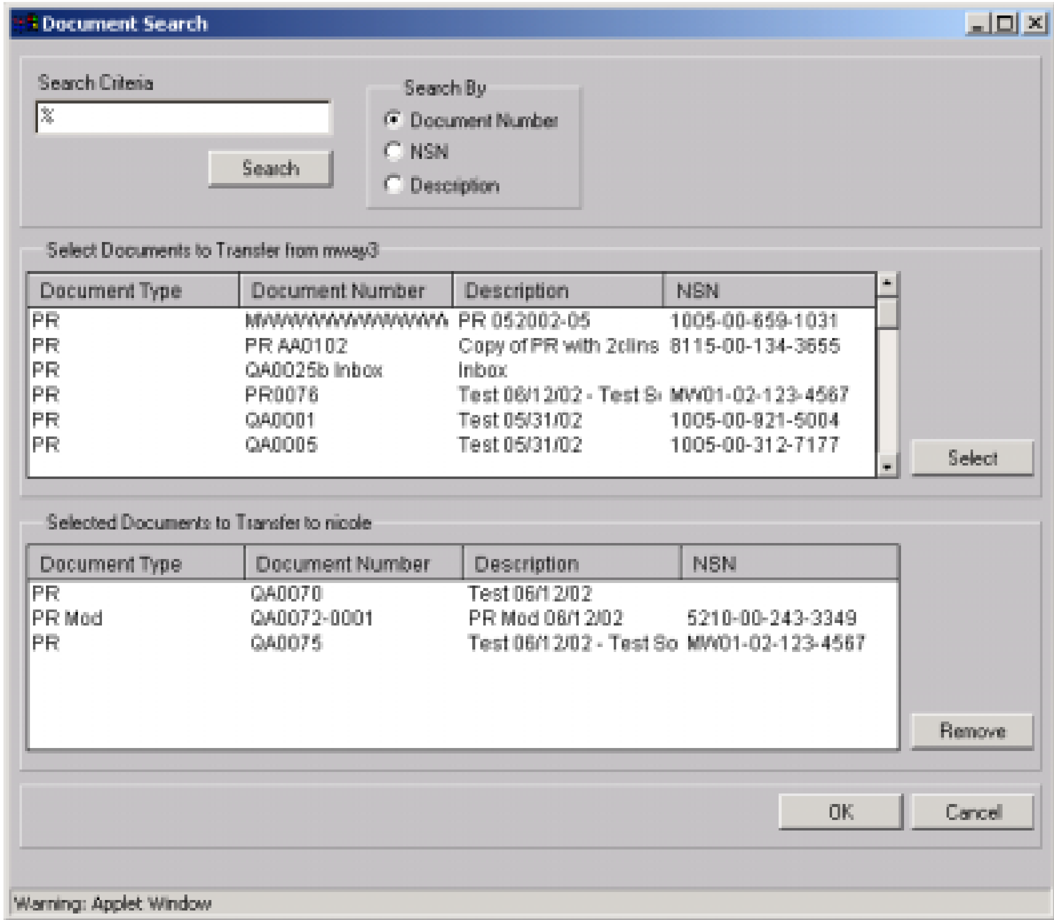

Figure 230: Document Search Window

9. Click the [**OK**] button in the **Document Search** window.
10. Click [**Yes**] to the Confirmation.

Note: E-mail notifications are sent to the **Transfer From** user and **Transfer To** user informing them of the documents that were transferred.

Chapter 12: Help

The **Help** menu provides the *PRweb* user with various modes of user support including access to *PRweb* online help, SPS/AcquiLine Help Desk, and About *PRweb*.

In This Chapter…

Using the Help functions described in this chapter, you can:

- Access *PRweb* online help
- Contact the help desk
- Learn more about PR*web*

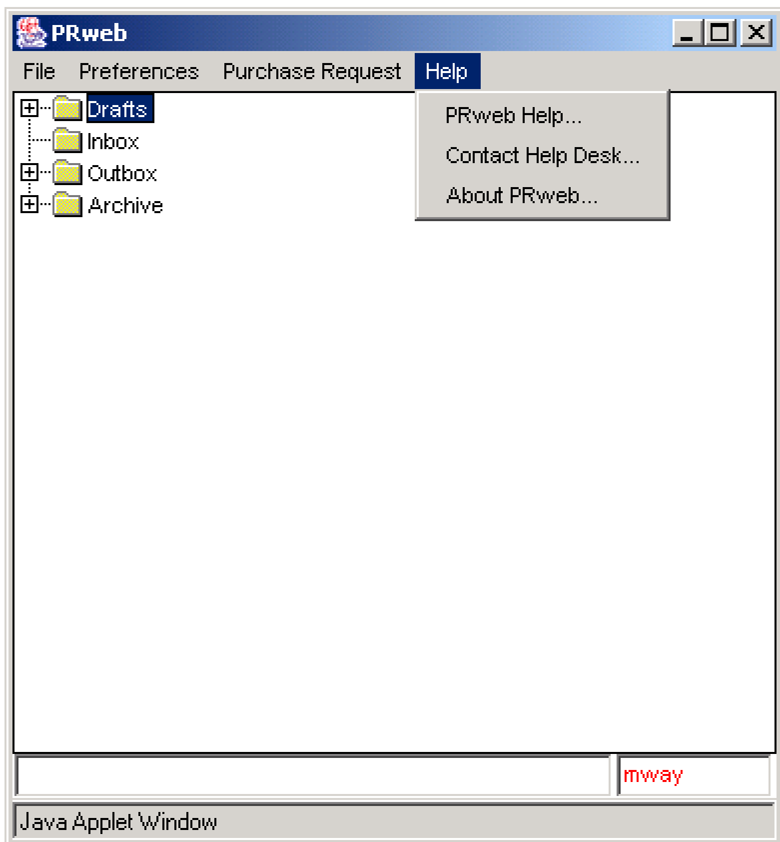

Figure 231: PRweb Help Menu

PRweb **Help**

The *PRweb* Help menu option allows the AcquiLine *PRweb* user to access the on-line *PRweb* Help Guide.

To access the *PRweb* Help Guide:

1. From the menu, select **Help → PRweb Help**.

   *The **AcquiLine PRweb v2.3 Help** window opens.*

Figure 232: AcquiLine PRweb 2.3 Help – Microsoft Internet Explorer Window

2. Double-click on the desired topic.

Contact Help Desk

The **Contact Help Desk** menu option allows the *PRweb* user to access the *PRweb* Product Support web page and submit/receive electronic questions/answers for functional and technical issues.

To contact the SPS/AcquiLine Help Desk:

1. From the menu, select **Help → Contact Help Desk**.

The PRweb Product Support web page opens a new Web browser window.

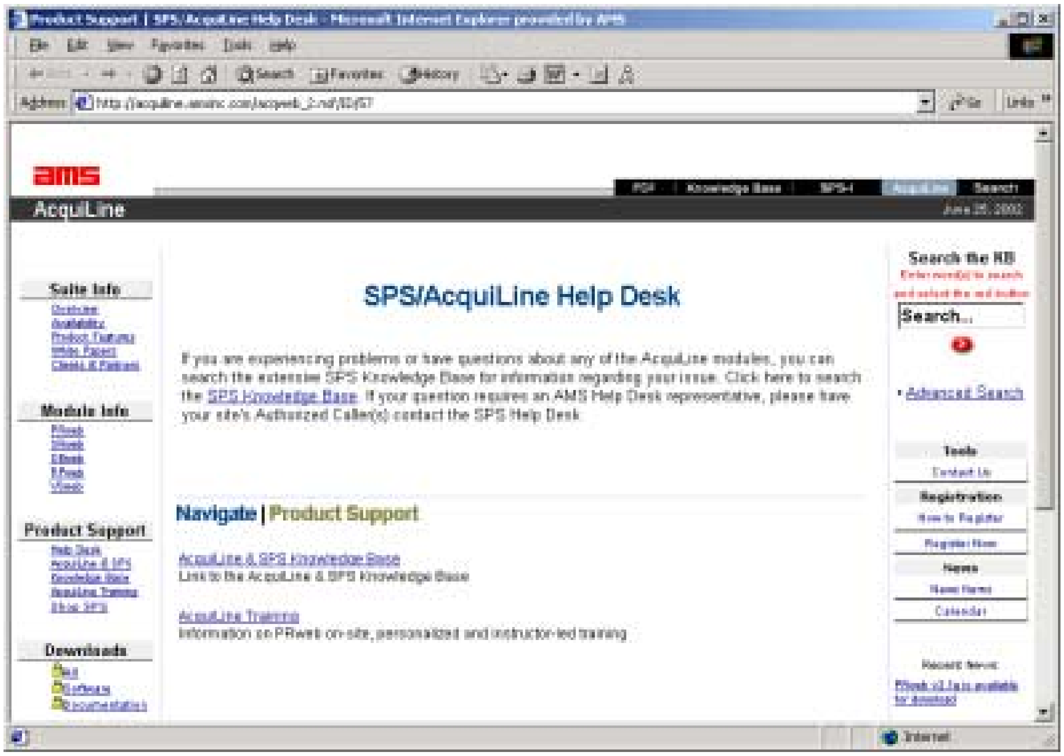

Figure 233: Product Support Web Page

2. Click on **SPS Knowledge Base**.

   The AMS SPS Knowledge Base window opens.

   Here you can find answers to the most frequently asked questions about PD^2, SPS-I or *PRweb*. Other topics include Headlines, Work Stations and Help Desk Records.

About *PRweb*

The **About PRweb** menu option allows the *PRweb* user to view the application name and version. To open the **About PRweb** window, select **Help → About PRweb** from the desktop menu bar. To return to the desktop, click the [**Close**] button.

Figure 234: About PRweb Window

Glossary of Terms

A

Access Rights

The privileges given to users by the System Administrator that determine whether they can view, change, move, or delete an object owned by themselves or another user. Generally, also refers to the privileges associated with menu choices and document creation. Access Rights are defined in System Administration.

ACRN

Accounting **C**lassification **R**eference **N**umber. A two-position alpha or alphanumeric control code used to relate the accounting classification citation to detailed line item information.

Active Window

The window in which you are currently working (not necessarily the window that opens on the screen). The Title Bar of an active window is highlighted in a different color, usually blue, than any other open window on the Desktop. Any new documents created are automatically placed in the Active Window.

ADC

After **D**ate of **C**ontract. Used in lieu of specified delivery dates when the delivery of an item cannot be established until a contract is in place. Calculated based on the effective date of a released award or the delayed effective date (whichever is later). Delivery may be specified as a certain period of time after award of the contract. Used as one of the delivery date options in Line Item Detail.

AFATA

After **F**irst **A**rticle **T**est **A**cceptance. Used to define delivery dates when a First Article Test is required. Used as one of the delivery date options in Line Item Detail.

AMS

American **M**anagement **S**ystems, Inc. Located in Fairfax, VA, the prime contractor of AcquiLine *PRweb* and PD^2.

Approval

A *PRweb* process that permits authorized users to electronically approve procurement documents.

Attachment

A third party file (e.g., Word or Excel or any third party software that is OLE 2.0 compliant) used in the procurement process. As an attachment in AcquiLine, this file can be associated with a document and is represented by an icon on the desktop.

Auto Calendar

A feature that allows the *PRweb* user to enter a date on a field from a calendar interface.

B

Buttons

Buttons in a window that initiate an immediate specific action; e.g., [**Search**], [**Select**], [**Add**] or [**Delete**].

C

CLIN

Contract Line Item.

Contingent Approval

An approval action specifying that the user approves a document under certain conditions. If a document is contingently approved, comments should be provided detailing why it has not been "fully approved" in the field provided on the Approval Sheet.

Contacts

Names of key personnel in the Vendor and Organization profiles. Contact names display in the appropriate fields in documents and may be used as search criteria in the **Address Search** window.

D

DD254

A Contract Security Classification Specification form. This form provides general security requirements for a particular requirement package.

Desktop

The user's workspace in *PRweb*. This workspace contains job-related tools (e.g., applications, utilities, and reference materials), items being worked on, and files of completed actions (e.g., documents, spreadsheets, forms, and reports).

DFARS

Defense **F**ederal **A**cquisition **R**egulation **S**upplement.

Drop-Down List Boxes

Boxes that "drop-down" to display a list of options. These are indicated with a downward pointing arrow.

F

FAR

Federal **A**cquisition **R**egulation.

Fields

Rectangular boxes in which textual information is typed.

Folders

Containers used to organize multiple related files or documents.

G

Group

A common collection of users. Groups can be defined by office, position, or title. Group information is maintained in System Administration.

GUI

Graphical **U**ser **I**nterface. The software 'front-end' to most applications that allows the use of windowing, menu, and mouse techniques.

H

Hypertext

A form of on-line help in which users "jump" or move easily between related topics by clicking on a certain type of text. This is a feature in *PRweb* On-line Help.

I

Icons

Small pictures that represent files, applications, or documents.

J

Job Order Number

A cost accounting number that links funding to a specific task or job; e.g., construction or ship repair. In *PRweb*, job order numbers may be entered by any user. Access to job order numbers is limited to specified users unless access is provided to all users in PD^2 System Administration. Job order numbers are entered in procurement documents from the **Funding Sources** window.

L

Local Info

Local Information fields that are used to enter data that does not display elsewhere in *PRweb* or PD^2. Fields are designated locally to capture information needed for reporting and tracking purposes.

Logon

Accessing the *PRweb* applet with a username and password.

M

Menu

A list of commands that typically appears in a bar across the top of a window directly below the Title Bar.

Milestone Plan

A utility used in PD^2 to create a schedule for completion of a contracting action and to record progress against the schedule.

MILSTRIP

Military **St**andard **R**equisitioning and **I**ssue **P**rocedure. Number may be entered in Line Item Detail.

Multiple Deliveries

Refers to delivery information when a user has added more than one delivery in PD^2 to a line item.

N

NAICS

North **A**merican **I**ndustry **C**lassification **S**tandards. Code for the North American Industry Classification System to classify individual businesses.

NSN

National **S**tock **N**umber. A thirteen-position alphanumeric code that specifically identifies an item.

O

OLE

Object **L**inking and **E**mbedding. Provides the interface between *PRweb* and third party software.

Outbox

Object in which items are placed when they have been routed to other *PRweb* users. Displays as a container on the *PRweb* desktop.

P

PD²

Procurement **D**esktop - **D**efense. Pronounced "PD Squared." The commercial software product that the government acquired competitively to satisfy the requirements laid out by the Standard Procurement System program office. A combination of operating environment, applications, and utilities that run in Microsoft Windows.

PR

Purchase **R**equest. The generic, non-service specific document in *PRweb* that is used to record the requesting activity's requirement.

PR Mod

Purchase **R**equest **M**odification. A document that is used to modify a released Purchase Request.

Preferences

A group of options that define the settings on a user's desktop.

R

Radio Buttons

Buttons that represent a group of mutually exclusive choices in a window. They are round and fill with a dark circle when selected.

Refresh All

Allows the *PRweb* user to refresh all folders on the desktop to reflect changes.

Refresh Folder

Allows the *PRweb* user to refresh individual folders on the desktop to reflect changes.

Reject

An action indicating a PR has been rejected. If a document has been rejected, comments should be given in the field provided on the approval sheet.

Route Template

Allows the *PRweb* user to create his/her own specific route templates to complement current approval processes. Only users with appropriate security rights can create route templates.

Routing

Sending PRs and attachments to *PRweb* and PD^2 users. Accessed from either the Purchase Request File menu or desktop Purchase Request menu.

Routing Sheet

A form that specifies the users to whom a document is to be routed and the order in which that routing is to occur.

S

Select

The process of clicking on or highlighting an object.

SPS

Standard **P**rocurement **S**ystem.

SubCLINs

Sub Contract Line Items.

System Administration

A series of tasks that the System Administrator uses to manage and support *PRweb* features, such as security, access rights, user information, and templates. For more information on System Administration, refer to the *AcquiLine PRweb System Administrator's Guide*.

System Administrator

Title given to the person(s) responsible for creating and maintaining the data to support *PRweb*. For more information on System Administration, refer to the *AcquiLine PRweb System Administrator's Guide*.

T

Tabs

Rectangular buttons above forms that enable the user to easily move between the parts of a form.

Title Bar

The space at the very top of a window that indicates the application or object being worked in**.**

U

Universal Search Criterion

The percent sign (%) is used as the "wildcard" character in searches for vendors, organizations, objects, and keywords. It can be used alone to search for all items in the database in a given category or it may be used in conjunction with letters or words to narrow the search.

User

The individual person using *PRweb*. The user account is maintained in System Administration. Each user has a username, password and contact profile.

W

Windows

Screens that display files and documents, and “hold” applications and utilities while they are being used.